Transforming the University
A Short Course
(continued)
Goals of the Short Course

1. Build a shared vision and a shared commitment to the actions necessary to move toward this vision.

2. Give each of us an opportunity to help shape and refine the Vision 2017 and to participate in the development of the transformation plan.

3. To come out of these sessions with a shared and total commitment to this agenda.

NOTE: All members of this group must be committed both to the vision and the transformation process if it is to succeed.
The Lesson Plan

1. An Overview of the Course

2. Consider and assess forces of change
   ...nation and world
   ...higher education
   ...UM specific

3. Examine ways that other institutions are responding, e.g., Ivys, UC, Big Ten


5. Review Vision 2017 document

6. Review "proto" Transformation Plan
Required Texts

• "Vision 2017: The Next Century"
• "Vision 2000: The Leaders and Best..."
• "The Michigan Metrics Project"
• "Leadership for the 21st Century: Strategy Planning at UM"
• "The Challenge for the 1990s: Transforming the University"
Other Reading

1. Planning and transformation efforts at other universities
   (Stanford, Harvard, Princeton, UCLA, Ohio State, Tulane...)
2. Key position papers
   (Shapiro, Rhodes, Schmitt,...)
3. Key national studies
   (PCAST, NSB, GUIRR, ...)

Office of the President

Winter, 1994
The Mission

Business Line:
Creating, preserving, transmitting, and applying knowledge

Products & Services:
Knowledge and knowledge-intensive services
Educated people with capacity and desire for leadership

Customers:
Primary: society at large
Others: students, patients, agencies,...
Shareholders: state, feds, private sector, public

Market Niche: Leadership!
Vision 2000

Vision 2000: "The Leaders and Best..."

To position the University of Michigan to become the leading university of the 21st Century.
The 26 Goal Plan

Leadership Goals:

1. To enhance the quality of all academic programs.
2. To sustain our unusual blend of broad access and high quality.
3. To build more spires of excellence.
4. To achieve more "firsts" for the University.
5. To become the leading research university in the nation.
6. To achieve the objectives of the Michigan Mandate.
7. To make UM the university of choice for women leaders.
8. To develop a new paradigm for undergraduate education.
9. To enhance the quality of the student living/learning environment.
The 26 Goal Plan (cont.)

Resource Goals:

10. To build strong leadership teams for the University.

11. To acquire the resources necessary to compensate for the erosion in state support.

12. To restructure the University to better utilize existing resources.

13. To strengthen our external relationships (state, feds, public).

14. To enhance the quality of institutional advancement activities.

15. To increase private support to exceed state appropriation by 2000.


17. To dramatically improve the quality of UM facilities.
The 26 Goal Plan (cont...)

Trailblazing Goals:

18. To restructure the University to better respond to intellectual change.

19. To explore new models of the "university of the 21st century".

20. To position UM as a "world university".

21. To position UM as a possible model of the "electronic university".

22. To make UM a leader in knowledge transfer to society.

23. To make the Ann Arbor area an economic engine for the midwest.

24. To assist in "restructuring" the State of Michigan.

25. To provide leadership in intercollegiate athletics.

26. To build more of a sense of pride in... respect for... excitement about... and loyalty to the University of Michigan!
Moving Toward Vision 2000

The Historical Model of UM
...unusually large state support
...unusual commitment to excellence
...selective admissions policy
...focused strength in professional schools
...small commitment to purely state interests
...ranked among best publics (…< UCB)

Themes of Change
...Pluralism and Diversity
...Globalization
...Age of Knowledge
...A Finite World
...Rebuilding America

The Strategy for the 1990s
Vision 2000
Mission: Leadership
...Evolution of Goals
...Metrics Project
26 Goal Plan
20 Goal Plan
10 Goal Plan

Goals of Leadership

The 1990s Evolution
...state-supported to state related
...1st in nation in research
...moving past UC in quality

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Winter, 1994
Some Different Paradigms

- the state-related--but world-supported--university
- the world university
- the diverse university (or "trans-versity")
- the cyberspace university
- the creative university
- the divisionless university
- the adult university
- the university college
- the Catholepistemiad
- the "university within the university"
- the "knowledge server"
Values

• Excellence
• Leadership
• Critical and rationale thinking
• Liberal learning
• Diversity
• Caring and concern
• Community
• Excitement
Descriptors

"The leaders and best…"
"An uncommon education for the common man (person)…"
"A broad and liberal spirit…"
"Diverse, yet united in a commitment to academic excellence…"
"A center of critical inquiry and learning…"
"A independent critic and servant of society…"
"A relish for innovation and excitement…"
"Freedom with responsibility for students and faculty…"
"Control of our own destiny comparable to private universities…"
The Fundamentals

Attracting, retaining, and sustaining the most outstanding people (students, faculty, staff)

Achieving, enhancing, and sustaining academic excellence in teaching and scholarship

Optimizing the balance among quality, breadth, scale, excellence, and innovation.

Sufficient autonomy to control our own destiny.

Sustaining the University's role as an independent critic

A diversified resource portfolio, providing a stable flow of resources necessary for leadership and excellence regardless of the ebb and flow of in particular areas (state, federal, private giving…)

Keepin' the joint jumpin'!

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Questions, Questions, Questions…

1. What is the fundamental role of the university in modern society?

2. How does one preserve the public character of an increasingly privately financed university?

3. Should we intensify our commitment to undergraduate education? If so, then how?

4. What is the proper balance between disciplinary and interdisciplinary teaching and scholarship?

5. Does the PhD degree need to be redesigned (or even replaced) to meet the changing needs for advanced education and training?

6. How should we select the next generation of faculty?

7. How do we respond to the deteriorating capacity of the state to support a world-class research university?
Questions, Questions, Questions…etc.

8. How good should we strive to make our programs?

9. How do we enable the University to respond and flourish during a period of very rapid change?

10. How do we best protect the University's capacity to control its own destiny?

11. Should the University be a leader? If so, then where should it lead?

12. Should our balance of missions shift among
    …teaching, research, and service?
    …undergraduate, graduate, and professional education?
    …serving the state, the nation, and the world?
    …creating, preserving, transmitting, and applying knowledge?
Objectives of the Transformation Process

What are we trying to accomplish through the transformation of the University?

• Move beyond simply positioning the University for leadership by polishing the status quo (essentially the approach of Vision 2000 and the 26 Goal Plan).

• Provide the University the capacity to transform itself more radically to respond to a changing world.

Do we expect to achieve Vision 2017 during our tenure?

No. But we should seek to build the capacity, the energy level, the excitement, and the commitment necessary to enable the University to move toward this vision.
A Particular Challenge

Throughout the past decade, we have tried to make the University of Michigan the finest 20th Century university in the world. In many ways, we have made great progress toward this objective. (Indeed, some would argue we have achieved this goal.)

Yet now we must convince folks that we must turn in new directions, that the "Vision 2000" is no longer adequate, and that we now must transform the university into a form more suited to serving the 21st Century.

Not an easy challenge...as the folks at IBM will tell you...
How have we achieved change in the past?

1. "Buying" change with additional resources.

2. By laboriously building the consensus necessary for grassroots support of change.

3. By changing people in key positions.

4. By finesse..."stealth of night"...

5. "Just doing it"...that is, top-down decisions followed by rapid execution (following the old adage that "It is sometimes better to ask forgiveness than to seek permission.")
The Gutenberg Principle

Finding ways to disguise innovation as extrapolation of the existing paradigm to enable it to be accepted in a conservative community.

(E.g., make the first movable type fonts look like the manually produced Bible manuscripts so they would be adopted by the Church...)
Some lessons learned...

1. The real challenge of transformation is generally not financial or organizational. It is cultural. We must transform a set of rigid habits of thought and arrangements that are currently incapable of responding to change either rapidly or radically enough.

2. It is important to have true faculty participation in the design and the implementation of the transformation process—through the involvement of the true intellectual leadership of the faculty.

3. It has been found that the use of an external group is helpful in providing credibility to the process.

4. No universities have been able to achieve major change through the motivation of opportunity and excitement alone. It has taken a crisis to get folks to take the transformation seriously.

5. The president must play a critical role both as a leader and as an educator in designing, implementing, and selling the transformation process, particularly with the faculty.
The Leadership Teams

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Winter, 1994
The EO Transformation Team

Why should this subset of EOs play the key role in leading the transformation process?

1. The executive leadership of the University.
2. The leadership of UM-AA.
3. All are proven academics:
   ...with advanced academic degrees
   ...with faculty experience
4. All have unusually broad experience in higher education.
5. This group has the best understanding of the nature of the University and the broad range of issues facing higher education during the 1990s and beyond.
Transformation Diagram

Transforming the University

Questions

What are our real objectives? ...
Vision 2000? ....
26 Goal Plan? ...Serving state, nation, or world? ...
Vision 2017? How dramatic do we need to be?

How rapid? Over what time frame?

Style Issues

Logical incrementalism
...small wins ...Machevellian approach

Blockbuster goals
TQM ...bottom-up ...continuous improvement ...benchmarking

Restructuring Plan

Timescales

Leadership

Design of Plan Internal communications plan External communications plan

Evaluation and Assessment

Character and Mission

Public character-->Jeffersonian model State-supported-->state-related

State-->nation-->world Downsizing or growth strategies New paradigms?

Finances

Revenues ...30/30-->40/40-->50/50 strategy
...State support (HTS or WM?)

Expenditures ...ETOB, "privatizing" strategies ...CPI + unit reallocation
...Centralized reallocation
...Internal pricing strategies

Costs ...Best practices comparisons ...Compensation, benefits

...Underutilized capacity

Unbundling prices, products, costs

Organization and Governance

Administrative ...EO restructuring ...ETOB-->resource centers

...Right-sizing hierarchy

Board of Regents ...Trustee role ...Board of Directors role

Programs

...Schools vs. centers

...Program discontinuance

Virtual Structures ...University within University ...Gateway College

Quality-Size-Breadth

UMAA Size UMD, UMF trajectories

Program review and modification

Downsizing strategies Growth strategies New market strategies

Intellectual

Curriculum ...Reducing UG specialization ..."Just-in-time" education ...Clean-sheet redesigns

..."BLS"-Rennaissance Degree

...Is the PhD obsolete? ...Year-round programs

Research

...Centers vs. departments

...Virtual structures

Integrative Complexes ...ITIC ...Gateway Campus

Culture

Decentalization vs. centralization

TQM, M-Quality

Staff, Faculty productivity Outsourcing Incentives

Risk-taking, fault-tolerant

Entrepreneurial attitudes

The Environment

Internal

...Faculty
...Students ...Staff ...Regents

External

...Lansing ...Washington ...Community ...Public

...Alumni
The Areas of Transformation

1. The Mission of the University
2. Financial Restructuring
3. Organization and Governance
4. General Characteristics of the University
5. Intellectual Transformation
6. Relations with External Constituencies
7. Cultural Change.
Transformation Areas
The Approach: Strategic Initiatives

The transformation effort will be organized into a series of parallel strategic initiatives or thrusts, each designed to be

- self-contained
- a clearly-defined rationale
- specific objectives

The trick will be to select, execute, and coordinate these strategic initiatives so that they enable the University to transform itself and allow the major paradigm shifts suggested in Vision 2017.
Strategic Thrusts

The Michigan Mandate

- Financial Restructuring
- Asset Management M-Quality

Campus Evolution

- Intellectual Restructuring
- Research Environment
- Superstar Project
- The University College
- Student Living/Learning
- Cultural Change
- Leadership Building
- Human Resource Development
- Community Building

Strategic Marketing

- The Electronic University
- The World University
- University Enterprise Zones

Community Relations

- State Relations
- Federal Relations
- Alumni Relations

Visions

- The Uni-di-versity
- The State-Related University
- The Divisionless University
- The Creative University
- The Knowledge Server
- The University College
- The Cyberspace University
- The World University
- The New University
- The Catholepistemiad

Transformation Areas

- Character and Mission
- Financial Restructuring
- Organization and Governance
- Characteristics
- Intellectual Restructuring
- Cultural Transformation
- Constituency Relations
Actions and Magic Bullets

Goal of Transformation Process:
Developing the Capacity for Change

Strategic Thrusts:
- Policy/Process Overhaul
- Michigan Mandate
- Michigan Agenda
- Partnership Model
- Intellectual Restructuring
- University College
- RANN Structure

Magic Bullets
- UG Research Projects
- Next Generation Leadership
- Personnel Reassignment
- UMTV, electronic linkages
- B.L.L. Degree
- Internationalization
- University Professors

Areas
- Mission
- Financial
- Organizational
- Characteristics
- Intellectual
- External Relations
- Cultural

Paradigms
- State-Related U
- World U
- Uni-di-versity U
- Cyberspace U
- Divisionless U

University College
- Catholepistemiad
- New U
- Knowledge Server

Vision 2000
26 Goal Plan
New Supportive Actions

UM of 20th Century
UM of 21st Century
Character and Mission

- State-supported to state-related
- State to national to world university
- UM-D, UM-F, UMMA, UMAA relationships
- Securing and protecting UM autonomy
- New market strategies
- K-12, adult education, distance learning
- UM as supplier of educational resources
Financial Restructuring

• Cost/market based pricing (tuition and fees)
• Diversifying education products
  ...(e.g., resident, commuter, distance learning…)
• ETOB, "Partnership" resource allocation
• Shifting away from fund-accounting in management
• Restructuring staff benefits
• Capturing "venture capital" funds
• Filling underutilized capacity
• Re-centralization
  …Billet control
  …Major reallocation (including discontinuance)
• Resource development and flexibility
Some Tough Questions: Finance

1. For the near term there appear to be only two opportunities for significant revenue growth:
   - tuition revenue
   - auxiliary revenue
   How do we tap these?

2. Is it possible to achieve the "30/30-->40/40-->50/50" tuition/enrollment strategy?

3. How do we move toward a cost/market-driven tuition and financial aid model?

4. Should we move ahead rapidly to implement the "Partnership" financing model?

5. Can we develop and implement alternative policies for non-degree granting units (e.g., "sunset" provisions)?
Some Tough Questions: Finance-2

6. What is the appropriate level of funding needed for investing in new opportunities? 2% per year? 5% per year? Where do we get these resources?

7. How do we deal with the rapidly escalating costs of benefits?
   • Flexible benefits
   • Post-retirement health care
   • Elimination of mandatory retirement caps

8. Can we shift more support units to "OEM" status, requiring them to compete with outsourcing?

9. How can we develop more flexible personal policies for BOTH faculty and staff?

10. How can we do a better job both of understanding our own operations and benchmarking our activities and costs against those of institutions of comparable scale and complexity?
Organization and Governance

- Overhauling process and policies to allow change
- Next generation leadership project
- EO restructuring
- Administrative restructuring
  - Removing middle management layers
  - Rightsizing units
  - Restructuring personnel policies
- Matrix structures
  - School and college affinity clusters
  - University-wide research projects
  - Virtual structures (Media Union, Gateway Campus)
- Re-engineering with information technology
Some Tough Questions: Organization

1. Do we need to reorganize executive officer responsibilities and functions to better lead the transformation effort?

2. Can we remove the constraints on the way we organize our academic programs (e.g., internal program discontinuance policies or accreditation requirements)?

3. How can we streamline management and remove unnecessary management layers and positions? Can we develop more flexible personnel policies which will allow us to make the necessary changes?

4. Can we "re-engineer" more of the activities of the University using information technology?

5. How might we achieve a "clean sheet" reorganization of the University?
Present Roles of Executive Officers

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<th>Executive Officers</th>
<th>Functions</th>
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<tr>
<td>President</td>
<td>Regent Relations, Intellectual Leadership, Academic Units</td>
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<td>Provost</td>
<td>Budget Planning, Academic Services, Business and Finance, Physical Plant, Personnel</td>
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| Medical Center     | |
| Information Technology | |
| Diversity Agenda   | |
| Undergraduate Education | |
| Graduate Education | |
| Professional Education | |
| Public Service     | |
| Regional Campuses  | |

Office of the President

Winter, 1994
New Roles of Executive Officers

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<td>Student Services, Student Life, State Relations, Federal Relations, Community Relations, Public Relations, Fundraising, Internal Communication</td>
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<td>Medical Center, Information Technology, Diversity Agenda, Undergraduate Education, Graduate Education, Professional Education, Public Service, Regional Campuses</td>
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Strategic Thrusts

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- Financial Restructuring
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- Campus Evolution
- Intellectual Restructuring
- Research Environment
- Superstar Project
- The University College
- Student Living/Learning
- Cultural Change
- Leadership Building
- Human Resource
- Development
- Community Building
- Strategic Marketing
- The Electronic University
- The World University
- University Enterprise Zones
- Community Relations
- State Relations
- Federal Relations
- Alumni Relations
An Alternative Taxonomy

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Characteristics

- The Michigan Mandate
- The Michigan Agenda for Women
- Internationalization of UMAA
- UMAA characteristics
  ...enrollments
  ...program mix
  ...campus evolution
- UMD, UMF trajectories
- New market strategies
Some Tough Questions: Characteristics

1. What is the appropriate size of the Ann Arbor campus?

2. Do we need to make major changes in the distribution of enrollments among undergraduate, graduate, and professional programs?

3. What is the appropriate trajectory for the UMD and UMF campuses?

4. Do we need to develop new markets? (E.g., distance learning)
Intellectual Restructuring

• Reduce specialization
  ...Reduce number of courses
  ...Core UG curriculum for all majors (Gateway Campus?)
  ...Merging of overly-specialized graduate programs
• Restructuring of PhD degree
• "Research Applied to National Needs" Projects
• Major integrative complexes
  ...ITIC, Gateway Campus
• Faculty roles
  ...University Professors, tenure-->contracts,...
• The New University
Some Tough Questions: Intellectual

1. How can we dramatically reduce the degree of specialization in our academic programs?

2. Do we need to achieve a major paradigm shift in the nature of undergraduate education? If so, then how do we go about this?

3. Do we need to achieve a major paradigm shift in the nature of graduate education? If so, then how do we go about this?

4. What about a conscious effort to more to more non-degree instruction (e.g., "just-in-time" learning)?

5. How do we better enable the University to undergo vigorous intellectual change--led by our strongest faculty?

6. Should we embark on a series of University-wide research efforts aimed at the great challenges facing contemporary society (e.g., global change, K-12 education, urban studies...)?
External Relations

- Rebuild state relations function
- Augment statewide outreach with sustained polling
- Develop a more strategic approach to Washington
- Community campaign
- Rebuild Development leadership
- International strategies
Some Tough Questions: External Relations

1. Should we develop more of a marketing approach to community and state relations? If so, then how?

2. How do we develop a more strategic approach to federal relations?

3. Is there a need to better integrate the activities of the UM Alumni Association with the University?

4. Should we develop key international focal points for outreach, e.g., Hong Kong, Tokyo, London, Berlin?

5. How do we couple our external relations activities with a strategic internal communications effort?
Cultural Issues

- Faculty responsibility and accountability
  - Faculty governance
  - Undergraduate education
- Faculty and staff productivity
  - Workload balancing
  - Career development
- Incentives
  - Compensation
  - Awards, honors
- Streamlining the decision and execution process
- Services as OEMs, outsourcing
- Entrepreneurial incentives
- Risk-taking, fault tolerance
Some Tough Questions: Cultural

1. How do we change the faculty culture to achieve:
   • greater accountability and responsibility?
   • greater loyalty to the University?
   • broader intellectual teaching and scholarship?
   • more risk-taking and innovation?

2. How do we empower our best faculty to play more significant roles in the future evolution of the University?

3. How can we overcome the inertia of the status quo and consensus to provide the University with the capacity to make and execute decisions rapidly enough to respond to the changing needs of society?

4. How do we distinguish between the "academic" culture characterizing faculty and students and the "professional" culture characterizing staff?

5. How do we build a culture of tolerance and respect that values diversity on our campuses?
Some Tough Questions: General

1. How do we make the case to the University community--and our various external constituencies--that rapid and profound change is necessary? How do we create the necessary sense of urgency, along with the sense of confidence and excitement that makes dramatic change possible?

2. How dramatic and rapid does our transformation effort need to be? Is it evolution ("extrapolation") or revolution ("innovation")?

3. Are we getting the right people in key leadership positions to understand and execute the transformation process?

4. What role should the Deans play? What about the Regents?

5. How do we handle large units that will be particularly resistive to change? (LS&A? Engineering? Law?)

6. How do we balance the University's tradition of decentralization and unit autonomy with the need to achieve institution-wide transformation?
Steps in the Transformation Process

1. Build a shared vision among the Executive Officers
2. Augment the EO Team with selected deans and directors
3. Involve the Regents in the transformation effort
4. Creation of advisory groups
5. Implementation of strategic communications efforts
6. Launching Presidential Commissions
7. Igniting the sparks of transformation
8. Streamlining process and procedure
9. The identification and activation of change agents
10. Selecting leadership for a period of change
Supporting Needs

1. The President's Vision

2. Strategic Communications/Marketing Efforts

3. Benchmarking and Assessment
Some Tough Questions: Supporting Activities

1. Is the President's "Vision" (e.g., the evolution of Vision 2000, Vision 2017, and the Transformation Plan) 
   …exciting, compelling? 
   …realistic? 
   …too complex? 
   …too comprehensive?

2. How important--and urgent--is it that we design and implement a strategic internal communications/marketing plan in support of this agenda? How do we go about doing this?

3. How do we resist the UM tendency toward rejecting anything "not invented here"?

4. How do we neutralize the "threats" of the moment to allow such a strategic effort? 
   …media manipulation (e.g., OMA, FIOA) 
   …faculty resistance to change (SACUA, etc.) 
   …brush fires (e.g., athletics, PC, salaries,...)
Transformation Actions

Goal of Transformation Process:
Developing the Capacity for Change

Strategic Thrusts:
- Policy/Process Overhaul
- Michigan Mandate
- Michigan Agenda
- Partnership Model
- Intellectual Restructuring
- University College
- RANN Structure

Magic Bullets:
- UG Research Projects
- Next Generation Leadership
- Personnel Reassigment
- UMTV, electronic linkages
- B.L.L. Degree
- Internationalization
- University Professors

Areas
- Mission
- Financial
- Organizational
- Characteristics
- Intellectual
- External Relations
- Cultural

Paradigms
- State-Related U
- World U
- Uni-diversity U
- Cyberspace U
- Divisionless U
- University College
- Catholepistemiad

New U
- Knowledge Server

Vision 2000
- New Supportive Actions
- UM of 20th Century
- UM of 21st Century