

An Operating Manual for the Presidency

Version 1.1

James J. Duderstadt
April 1996

Some Historical Observations

Each president seems to have filled a particular leadership role for the University, perhaps less as a result of the intention of the selection process than the degree to which the institution, its needs, and its opportunities have shaped their presidency. Henry P. Tappan provided strong, visionary leadership to establish Michigan as a true research university. (Unfortunately, he was also the first and last UM president to be dismissed by the Board of Regents, thereby demonstrating the hazards of being ahead of one's time.) Erastus O. Haven was a stabilizer, carrying out the policies of Tappan with quiet competence and diplomacy.

James B. Angell built Michigan into a truly national university. He served longest of Michigan's presidents (thirty-eight years) and presided over a major growth period. He was a national leader in higher education, positioning Michigan to provide "an uncommon education for the common man." He was followed by Harry B. Hutchins, a scholarly lawyer, who consolidated the progress made during the Angell years.

Marion L. Burton, although serving for only a short period, was a builder, overseeing an extraordinary period of expansion in which the Central Campus as we know it today was built. Another short-timer, Clarence C. Little, was innovative, energetic--and very controversial. The legend is that Little was pushed out because he challenged LS&A and proposed the formation of a university college. It is more likely that he was a political casualty because of his opposition to prohibition.

Both Burton and Little were followed by another consolidator, Alexander G. Ruthven, who presided during the crisis years of the Great Depression and World War II. Ruthven established the corporate structure of the University, much as we know it today. Harlan H. Hatcher led the University during the period of its greatest growth, responding to the returning veterans and the post-war baby boom. He established new campuses in Flint and Dearborn, as well as the North Campus.

Robben W. Fleming was yet another consensus building and conciliator, protecting the University's strength and autonomy during a decade of great unrest on our campuses and throughout society.

Harold T. Shapiro is sometimes known for piloting the University through a period of great economic duress--the "smaller but better" strategy. In reality, it was Shapiro who made the first commitment to make Michigan a truly great university. First as provost and then as president, he raised the standards and expectations for faculty and student performance; and he was unrelenting in his insistence on academic excellence.

The Duderstadt Presidency

To better understand the approach taken during my years as president, it is useful to first consider in the abstract the various functions of a modern university president.

The president has a variety of important roles. First, there are leadership roles:

- develop, articulate, and implement visions and programs that sustain and enhance the quality of the institution
- originate bold and creative long-range thinking about intellectual, social, financial, human resource, physical, and political issues
- focus on the future, while providing an understanding of the present with a sense of tradition

Second, there are symbolic leadership roles as chief executive officer of the institution. These include relating to its various internal constituencies and representing the university to various external constituencies.

Finally, there is an array of pastoral roles: providing a source of caring and emotional support, energy, and guidance for the institution.

It is a fact of life that no president can possibly fulfill all of the dimensions of these various roles. Hence, a president must first determine which aspects of the role best utilize his or her talents. Then a team of executive officers and staff must be assembled that can extend and complement the activities of the president in order to deal with the full spectrum of the University leadership role.

I determined my most important role as “strategic leadership”; that is, providing the vision, the energy and excitement, and the direction to propel and guide the University into the next century. In this sense, I viewed my leadership of internal campus affairs as largely strategic in nature. It was my role to stress key themes, but not to become involved in the tactical, day-to-day decision process. Rather I relied on delegation to a strong executive team and stressed decentralization of both authority and responsibility.

However, I did accept primary responsibility for the interface between the University and its various external constituencies, including directing institutional advancement and addressing key state, national, and societal issues.

In looking back, I believe there were three quite separate phases in my presidency. The early phase involved setting the themes of challenge, opportunity, responsibility, and excitement. During this phase, I spent much of my time meeting with various constituencies both on and off campus, listening to their aspirations and concerns, challenging them, and attempting to build a sense of excitement and optimism about the future of the University. During this period some of the most important strategic directions of the University were established: e.g., the Michigan Mandate, the Michigan Agenda for Women,

financial restructuring, the Campaign for Michigan, and student rights and responsibilities.

This highly visible process of interacting with both on-campus and external constituencies was an ongoing strategic-planning process involving some of the most visionary members of the University faculty and staff. These numerous small groups worked closely with me to develop an action plan, Vision 2000, aimed at positioning the University as the leader of higher education in America.

The second phase of my leadership, while not so public, was far more substantive. A series of strategic initiatives were launched that were designed to execute the strategic plan, Vision 2000, and position the University for a leadership role. These ranged from the appointment of key leaders at the level of executive officers, deans, and directors to the largest construction program in the history of the University to a bold financial restructuring of Michigan as the nation's first "privately-supported public university." Largely as a result of these efforts, the University grew rapidly in strength, quality, and diversity during the early 1990s. One by one, each of the goals of Vision 2000 was achieved.

By the mid-1990s, I began to shift the University into a third phase, evolving from a positioning effort to a transformation agenda. I had become convinced that the 1990s would be a period of significant change for higher education. The task of transforming the University to better serve society and to move toward a vision for the century ahead would be challenging. Perhaps the greatest challenge of all would be the University's very success. I realized it would be difficult to convince those who had worked so hard to build the leading public university of the twentieth century that they could not rest on their laurels; that the old paradigms would no longer work. The challenge of the 1990s would be to reinvent the University to serve a new world in a new century.

I also realized that the transformation of the University would require wisdom, commitment, perseverance, and considerable courage. It would require teamwork. And it would also require an energy level, a "go-for-it" spirit, and a sense of adventure. But all of these features had characterized the University during past eras of change, opportunity, and leadership.

A series of initiatives were launched designed to provide the University with the capacity to transform itself to serve a changing world. Since several of these initiatives were highly controversial, such as a new form for decentralized budgeting that transferred to individual units the responsibility both for generating revenues and meeting costs, I returned to a more visible role. In a series of addresses and publications I attempted to challenge the University community, stressing the importance of not only adapting to but relishing the excitement and opportunity of a time of change.

As I challenged the University to change in more profound ways to serve a changing world, it was also clear that I would gradually exhaust this political capital. Machiavelli stated it well:

“There is no more delicate matter to take in hand, nor more dangerous to conduct, nor more doubtful of success, than to step up as a leader in the introduction of change. For he who innovates will have for his enemies all those who are well off under the existing order of things, and only lukewarm support in those who might be better off under the new.”

In assessing the decade of my tenure as provost and president, it is clear that the University has made remarkable progress. It approaches the twenty-first century not only better, stronger, and more diverse than ever, but also positioned as one of the leading universities in the world. Perhaps it was not surprising that as a scientist, I would develop, articulate, and achieve a strategic vision for the University that would provide it with great financial strength, rebuild its campus, and position it as the leading research university in the nation.

Perhaps more surprising was my deep commitment to diversifying the University through dramatic initiatives such as the Michigan Mandate and the Michigan Agenda for Women. Further, the broad effort to improve undergraduate education and campus life were far beyond what one might have expected from one who had spent his academic career in graduate education and research.

I believe that during the years of my leadership, the University of Michigan completed the ascension in academic quality launched many years earlier by Harold Shapiro. Its quality and impact across all academic disciplines and professional programs ranks it among the most distinguished public and private universities in the world.

I feel that my most important contribution arose from my conviction that to serve a rapidly changing world, the University itself would have to change dramatically. As the strategic focus of the my administration shifted from building a great twentieth-century university to transforming Michigan into a twenty-first century institution, a series of key initiatives were launched that were intended as seeds for a university of the future. Certainly highly visible efforts such as the Michigan Mandate and financial restructuring were components of this effort. However, beyond these were a series of visionary experiments such as the Media Union, the School of Information, the Institute for the Humanities, the Global Change Institute, and the Office of Academic Outreach that were designed to explore new paradigms for higher education.

It will be for the next Michigan president to nurture these seeds--and to harvest their crop.

Some Unique Features of the Michigan Presidency

1. Complexity

The UM presidency is probably the most complex and demanding in the nation. It is dual chief executive officer role, since one serves as both head of a university system and leader of an individual campus. Further, since the UMAA campus is both physically the largest and intellectually the most diverse in the nation, this latter task is particularly challenging.

2. Administrative Structure

The University operates with one of the leanest administrations in the nation. For example, the small number of seven executive officers for UMAA is roughly half the size of most executive officer teams. Hence, the leadership of the University depends critically on getting the very best people into executive officer and senior administrative positions, since even one bad appointment can greatly impede the effectiveness of the leadership team.

3. Political Environment

The Michigan presidency is unusually political in nature, surrounded by a swirling array of local, state, and federal politics. The University of Michigan is unique in higher education in having a governing board determined by a partisan political process, which, in recent times, tends to bring political special interests to the table. Further, the state's sunshine laws, poorly drafted and extended far beyond their original intent by bad court decisions, are now regarded as among the most intrusive in the nation. While statewide media attention is usually balanced, the local newspaper, the *Ann Arbor News*, is usually hostile in its coverage. Finally, the University has a long history of political activism on campus which makes the role of the president always a challenge.

I have often referred to my experience as president as analogous to that of the frontier town sheriff in a old Western movie. Each morning I rose to strap on my guns and walk alone down the dusty main street to face yet another gunslinger riding into town to shoot up the University. While this daily confrontation with danger went with the territory, I also knew that one day I would run into someone quicker on the draw, and my presidency would come to an end.

Yet such is the nature of the Michigan presidency--indeed, the presidency of any major public university. Time and time again a president is called upon to stand up to those who threaten the institution, whether it be special interest groups, politicians ranging from Congressmen to governors, the media, or even its own governing board. Few presidents enjoy such confrontations. Yet, without a willingness to march into battle, a president will rapidly become ineffective, and the institution will become defenseless. To put it another way, a university president is not a general who remains far behind the front lines, sending others into battle. Rather leadership demands fighting again and again on the front lines, leading others into battle on behalf of the institution.

The Role of the Interim President

The University has frequently used the appointment of an Interim President to provide a transition between presidencies. Because of the complexity of the university and its need for strong leadership, it is important that the interim president not be simply a caretaker, but instead be a decisive leader, using the full powers of the office.

The first priority of the interim president is to maintain the momentum of the institution during the transition period. It is understandable that an interim president would probably choose not to launch a number of new initiatives that would change the course of the University and tie the hands of the next administration. Yet I believe it is the responsibility of the interim president to take those steps necessary to sustain the programs, direction, and momentum of the previous administration, since these have evolved over a considerable period of time and effort.

In a short period of time, it is clear that an interim president can only focus on a small number of issues. Since the executive officer team of the previous administration usually remains in place during the transition period, the interim president should rely heavily on delegation of most issues to those who have been handling them in the past, and focus attention instead on those few issues that require immediate attention. As examples, interim president Robben Fleming focused primarily on dealing with a resurgence of student activism while Allen Smith focused on launching the Replacement Hospital Project. Both relied heavily on their provosts and VPCFOs to manage the internal operations of the University during the transition.

From this perspective it is important for the interim president to have a good sense of where the strengths and weaknesses of the University leadership team lie. More specifically, one needs to understand who can be depended upon, who needs to be watched, and who cannot be trusted

So How Does the President Spend His/Her Time?

Below I have listed a number of the standing commitments of the president's time during my administration:

Boards

Personal

(JJD's case

National Science Board

Unisys

CMS Energy)

Professional

(JJD's case:

National Academy of Engineering

Executive Council

Academic Policy Committee

Manufacturing Forum)

American Nuclear Society
 American Society for Engineering Education
 National Society for Professional Engineers)
 University
 Executive Officers
 Academic Program Group
 UMMC Executive Committee
 Rackham Governing Board
 Clements Library
 University Musical Society
 Administration
 EO meetings
 Dean meetings
 APG
 Individual meetings
 EOs, Deans, Staff
 Searches
 Academic Matters
 Executive Committee Retreats
 Senate Assembly Retreats
 Meetings with individual schools and colleges
 Strategic Planning
 Faculty Governance
 Monthly meetings with SACUA
 Annual Address to Senate Assembly
 Development
 The Campaign for Michigan
 Development Strategy
 Solicitation and Cultivation
 Receptions, Dinners, and other Events
 Higher Education Groups (see below for detail)
 American Association of Universities
 National Assoc of State Universities and Land-Grant Colleges
 Committee for Institutional Cooperation
 Business Higher Education Forum
 American Council for Education
 Tanner Trust
 Legal Issues
 OMA
 FOIA
 Litigation
 Regents
 Regular meetings
 Special meetings
 Ceremonial events
 One-on-ones
 Medical Center
 UMMC Executive Committee
 Strategic Issues

On-campus: Showing the Flag

- Site visits
- Faculty recruiting
- VIP visits
- Athletics
 - UM Athletics
 - Big 10 Conference
 - NCAA
- Campus Events
 - Performing Arts
 - Academic Events
 - University Events
- State Relations
 - Statewide outreach
 - Governor
 - Legislature
 - Strategic Issues
- Federal Relations
 - Congress
 - White House
 - Federal Agencies
- Town/Gown
 - Community Leaders group
 - Civic events
 - Official events
- Special Initiatives
 - Michigan Mandate
 - Women's Issues
- Public and Media Relations
 - Michigan Daily*
 - Ann Arbor News*
 - State Press
 - National Press
- Student Activities
 - Student Groups
 - Michigan Student Association
 - Student Alumni Council
 - Parent's Weekend
 - Little Sibling Weekend
 - Graduation Events
 - Residence Halls
 - Greeks
- Faculty Activities
 - Henry Russel Dinner
 - Russel Award Dinner
 - National Academician Dinner
 - Faculty Dinners and Potlucks
 - Special Faculty Events
- Alumni Activities

Alumni Meetings
 Bowl Trips
 Visiting Alumni Associations
 UMAA DC Congressional Breakfast
 Regional Campuses
 UM-Dearborn
 UM-Flint

When routine chores such as handling correspondence, E-mail, telephone, and travel is added to this list, it becomes apparent that if the president is not careful, every minute of the day and night will end up scheduled long in advance.

Yet, after serving in Fleming for almost a decade, it is my belief that the President's most important role arises in responding to unforeseen challenges--sometimes crises--and opportunities, since these are generally situations that can be handled by no one else. Hence, it is absolutely essential to schedule one's time so that there is always a certain amount of flexibility to accommodate unforeseen situations. Leading the university requires the capacity to develop and build support for a vision, and then a consistent and persistent effort to move toward this vision. This also takes time, particularly to think. Incidentally, this is one area where Northwest Airlines is frequently helpful--being trapped on planes or in airports is one of the few times when one has uninterrupted blocks of time to concentrate

Higher Education Organizations and Meetings

The President serves as the official representative of the University in numerous organizations. Since the University of Michigan is generally regarded as the leader of public higher education in America (just as Harvard is regarded as the leader of private higher education), we are expected to play a significant leadership role in many of these organizations. While this provides us with many opportunities, it also imposes very significant responsibilities and time commitments on the president. Such is life . . .

1. Association of American Universities (AAU)

This is the most important of the higher education associations, since it is a presidents-only organization representing the top fifty-five research universities in the nation (and Canada). Since both presidents and spouses are involved together in its activities, it is also a very important mechanism in building personal relationships among the leaders of various universities. The AAU has two three-day meetings. The fall meeting is hosted by a member university (Caltech, USC, and UCLA this October), and the spring meeting is held in Washington. There are numerous special activities, particularly if you serve on one of the various AAU committees. (I currently serve on its Executive Committee, and Anne serves on the Partners Committee.)

2. National Association of State Universities and Land Grant Colleges (NASULGC)

This is the primary association of major public universities--roughly 130 or so. Since this involves many smaller institutions who are not UMAA peers and has strong participation by deans and others, Michigan has never given it the same priority as AAU. (Indeed, during the dark days of budget cuts, Harold Shapiro even considered withdrawing, which would have been a big mistake.) It is important for UM to stay involved and step up to leadership from time to time. I headed up its federal relations effort (with Tom Butts' able help) and have a good working relationship with the President, Peter McGrath.

3. American Council on Education (ACE)

This is the umbrella organization representing all of higher education (3,000 institutions strong). Although we belong, we have never been very active in the ACE itself, although we are in various sub-organizations such as CASE or NACUBO.

4. The Big Ten

Another high priority organization. The Big Ten is both an athletic conference and an academic association. The Council of Presidents tend to spend most of their time as the Board of Directors of the Big Ten Conference, Inc., but during my role as chair, I have tried to balance their activities to include more academic issues. The associated Committee on Institutional Cooperation is comprised of the provosts, and in recent years it has met from time to time with the Council of Presidents. The Council has two regularly scheduled meetings (two days each), at the Chicago conference headquarters in December and on a campus in June (in Ann Arbor this June). Since it is legally a Board of Directors, it has other frequent meetings, usually in Chicago or at AAU meetings, and monthly telephone conferences. I currently serve as chair of the board.

5. The Tanner Group

This is another command performance, since this group consists of the presidents and spouses of the leading universities in the world: Harvard, Michigan, California, Stanford, Yale, Princeton, Oxford, Cambridge--and Utah (which was the home institution of the benefactor, O. C. Tanner). The presidents/spouses serve formally as trustees of the Tanner Trust, which sponsors the Tanner Lectures on Human Values at each of the institutions. They meet for several days in late June, at either university campuses or world-class resorts (Bellagio last year). This June, our last meeting, is at Yale. Then Harvard (1997), Europe (1998), and Michigan (1999). This small group builds important personal friendships among the leaders of these institutions and is certainly one of the most enjoyable of the organizations.

6. Business Higher Education Forum

This organization, founded by ACE, consists of forty presidents and forty CEOs of major corporations. It meets twice each year (three-day meetings), usually in Arizona or California in January and somewhere in the U. S. or Europe in June. It is an organization that involves spouses, so it can be quite enjoyable. It is also a valuable opportunity to build some important relationships. (For example, for the past two years I have co-chaired a major task force on the

future of industry-university relationships with Tom Lebreque, CEO of the Chase Manhattan Bank.) Not a command performance, but definitely worthwhile.

7. Presidents' Council of State Universities of Michigan

Another important organization, consisting of the presidents and chancellors of Michigan's fifteen public campuses. This is the coordination body for public higher education in Michigan. Although UMAA, MSU, and WSU are the top dogs, the group operates as one-institution-one-vote. Hence we sometimes get outvoted with respect to issues such as our effort to prevent the proliferation of graduate programs. The group meets every other month at its Lansing offices, with a two-day retreat every September. The usefulness of the group depends very much on its leadership. When I chaired it, I pushed hard to achieve a strong spirit of cooperation. Unfortunately, my successors, Dieter Haniecke and Peter McPherson blew this apart with self-serving agendas, so the group hasn't been very cohesive or effective for several years. Since the chair rotates every two years between large and small schools, it is our hope that Jim Renick will be elected as the next chair.

8. Other Assorted Groups

There are a number of other bodies involved in higher education issues with Michigan participation, including the Government-University-Industry Research Roundtable (I am co-director with Dick Celeste of the university townhall meetings we have been hosting on various campuses over the past three years); the Pew Higher Education Roundtable (Bob Zemsky and crew); the Stanford Forum (Bill Massey); and various state and federal task forces. These come and go on a random basis.

The Office of the President

The Office of the President is the focal point for the myriad of issues swirling about and within the University. As such, it requires and benefits from a staff of unusual competence, professionalism, and loyalty. The Office is divided into four functional areas:

1. The President's Office

The enormous volume of paperwork, communication, visits, and other activities of the President's Office is handled by a staff of secretaries and administrative assistants managed by Carole LaMantia. Since the President's Office serves as the official representative of the University in a wide range of external and internal functions, the staff is characterized by an unusual degree of competence and sophistication.

2. The President's Personal Staff

The president's personal staff is quite small, and general consists of the Secretary to the President (Nona Mustard) and, on occasion, an Assistant to the President. Nona Mustard is quite simply the best secretary in the University, and she handles both the personal calendar and communication needs of the president with great skill and professionalism. While I have had various assistants to the president in years past (Robin Jacoby, Shirley Clarkson, and Connie Cook), in recent years I have tended to use a faculty rotator such as Ejner Jensen. In looking back, I am convinced that the Michigan presidency is sufficiently complex that it requires a senior staff assistant, and I would recommend that this position be re-established. (I was intending to do so prior to my decision to step aside.)

3. Presidential Events and Facilities

The many activities of the President and Spouse/Partner and the various facilities in which they host events (the President's House, Inglis House, and the Michigan Stadium pressbox areas) require strong staff support. Although this has been handled in many ways in years past, we have learned over time that the most effective way is to use a small staff, reporting directly to the President/Partner to maintain adequate quality control and cost-effectiveness. We utilize Barbara Johnson, as Director of Presidential Events and Facilities, and Judy Dinesen as a creative consultant in the design of events and the handling of caterers. Here, I should note that through this simple arrangement we have been able to achieve an extraordinary level of quality at a cost that is only a fraction of those characterizing other University operations. (In fact, we are currently operating with only one-third the staff level used during the Shapiro and Fleming years.)

4. Institutional Advancement

Much of the President's time is spent advancing the interests of the University in various ways, e.g., fund-raising, political lobbying, public relations. Although there are specific units of the University responsible for each of these functions, we have found that these units do not generally provide the personal level of support needed by the President. Hence, we have addressed these needs by having specific individuals on assignment to the President's Office, including a Development staff member (Pam Clapp), a marketing and communications staff member (Liene Karels), a speech writer (Mary Jo Frank), and occasional student assistants. The need for such staff support depends heavily on the particular priority given these activities by the President.

Presidential Facilities

The President and Spouse/Partner are responsible for several important facilities of the University including the President's House, Inglis House, and entertainment areas in the Michigan Stadium pressbox. Far from being perquisites, these facilities are critical to the performance of the role of the president. Their importance to institutional advancement and their high visibility demand that they be operated in a manner befitting their use but with careful attention to cost containment. Further, it is important that policies governing their operation be observed to preserve maximum flexibility while protecting these valuable facilities as resources for future leaders of the University.

A warning here: One of the most common landmines that university presidents step on involve inappropriate use of or expenditures on facilities such as the president's house, football pressbox facilities, personal offices, or travel activities. Many of these explosions result from well-intentioned efforts by staff to accommodate the needs of the president. Others arise from the insistence of governing board members for inappropriate perks. Still others occur simply because of a disconnect between internal and external perception. Nevertheless, the press is always on the lookout for opportunities to sensationalize the "misuse of public funds for personal prerogatives," while the faculty is always deeply suspicious of any "regal trappings of the office." Hence it is essential that a president always exercise strong personal vigilance and control over any of these highly visible aspects of the job.

Over the years, we have evolved an effective system of policies and procedures to protect the president--and the Regents--against such risks. These involve constraints on certain types of activities, careful management, and extensive audits of all expenditures. This has served us well, since we have avoided the embarrassments that have tripped up many other universities. But there are always pressures--particularly by the Regents--to bypass these safeguards, and these pressures must be resisted if the integrity of the institution is to be protected.

1. The President's House

The President's House is first and foremost the residence of the President and his family. This residential function must always take precedence over other uses of the facility; that is, the President's House is a private residence, not a public facility of the University.

Hence, the President and his family must always have final authority over the uses of the President's House. Furthermore, all events in the President's House must be hosted by the President and/or the President's wife.

As the oldest building on the campus, it is not surprising that the President's House has its share of problems. In fact, it was not originally designed as a residence but rather as a combination faculty / student residence and classroom facility. Since all eleven presidents of the University have lived in it at one time or another, it has been extensively modified over time and now exists as a three story, 14,000 square-foot facility. Most of the first floor is comprised of public space for University events. The President and family live on part of the second floor.

In earlier times, the House was maintained by live-in service staff. Even as recently as the Shapiro presidency, the House had extensive staff, including a full-time cook, two housekeepers, gardening staff, and a house manager. However, in today's era of cost-consciousness and criticism of public officials, we have reconfigured to minimize staffing and reduce costs. Today, we make use of the housekeeping staff of Inglis House to provide cleaning of the first floor public space roughly one day per week. We personally take responsibility for the maintenance of all family space, and all events are catered.

While this does reduce costs considerably, it also creates some security problems. At the present time, the two of us live alone in the House. Since the facility is quite exposed, it is frequently the target of those disturbed or angry people who want to lash out at such a public symbol. Furthermore, we get our share of pranksters or inebriated students. To address these security concerns, as a general rule we never answer the door unless we know who is ringing. (Our rationale is that anyone who has a legitimate need to see us knows how to reach us first by phone.) Further, we have had a sophisticated security system installed in the House with door and window alarms and motion detectors, connected directly into campus security. The House is also equipped with personal security radio alerts that can be used to alert Campus Safety. While these security mechanisms may seem extensive, the unfortunate experience both at Michigan and on other campuses indicates that the safety of the President and his/her family requires such measures. In fact, more and more presidents are leaving campus-provided housing to live in private off-campus residences for just this reason--and probably should at Michigan as well.

Operating Guidelines

1. The President's House is only used for small, intimate events such as breakfasts, lunches, dinners; small receptions; and meetings scheduled by the President.
2. All events in the President's House are hosted by the President and/or President's wife. Event scheduling and design is controlled by the President's wife.
3. The most common situation involves events initiated by the President and/or President's wife.

4. Another common situation involves requests by Development that the President host an event. Such requests are made through the VP Development directly to the President or President's wife.
5. On occasion, a University unit will request that the President entertain a group or a specific guest. If this request is associated with a development or Campaign prospect, it must first pass through Development (Tom Kinnear) for evaluation and assignment of priority. If the request is academic (e.g., recruiting) or political (state or government), it is routed to the President directly.

2. Inglis House

The Inglis estate comprises eight and one-half acres north of Geddes Avenue and is adjacent to the University Arboretum. The house, built in the style of an English country mansion, was constructed in 1927. The ground floor of the House consists of the principal entryway, a large library, restrooms, and service facilities. The first floor contains a combination living and dining room, kitchen, breakfast room, and a three-car garage. The master bedroom, two guest rooms, and maids' quarters are on the second floor; the third floor is a two-bedroom suite. The property also includes a caretaker's cottage, a greenhouse workshop, and extensive English gardens.

When first transferred to the University, the property was offered to President Harlan Hatcher to serve as the President's House. Although the Hatchers chose to remain in the original President's House at 815 South University--as have subsequent University presidents--the Inglis House property has continued to serve since that time as an extension of the President's House for entertaining, a guest residence for visiting dignitaries, for use of the Board of Regents, and for other official business.

The Inglis House estate is designed to be used as a guest house facility, serving the President as an extension of the President's House, and available to the Regents and senior Executive Officers (President, Provost, and Vice President and Chief Financial Officer) of the University for official University business and development activities. It is not designed or intended for use as a hotel, banquet facility, or conference center.

Since the house will be a critical resource for the upcoming Campaign for Michigan, use of the house during the Campaign period 1992-1997 will be restricted for development activities and University activities of the highest priority, as authorized by the senior Executive Officers of the University.

More specific guidelines for use of the facility during the Campaign period include:

1. The President and his/her Spouse may use the house as a means of extending their hospitality to any person or group.

2. The Regents, the President, and the senior Executive Officers (President, Provost, and Vice President and Chief Financial Officer) may use Inglis House for official University business such as the Provost Faculty Dinners.
3. Although Inglis House is intended as a guest house and not as a hotel, distinguished guests of the University (honorary degree recipients, foreign dignitaries, and other distinguished guests) and major development prospects may be granted the privilege of staying at the house, subject to the approval of the President.
4. Other University groups may use Inglis House for functions involving distinguished visitors to the University, upon the approval of one of the senior Executive Officers. Inquiries should be through the Coordinator of Presidential Events and Facilities.
5. Historically, two groups have been given the privilege of using the house over the years: the Faculty Women's Club for its monthly Board meetings, and the Economics Dinner Group. These privileges will continue indefinitely.

It has become customary for Inglis House to be offered to each new President as an alternative residence to the original President's House at 815 South University. Although no President has yet chosen Inglis House as a permanent residence, several have utilized Inglis House as a temporary residence during periods of extensive renovation to the Central Campus President's House. It is important that this opportunity be preserved for future Presidents. Hence, no modifications in the facility itself or its use should be allowed which conflict with the possible use of Inglis House as the President's residence.

3. Michigan Stadium Facilities

Michigan football weekends provide important opportunities for institutional advancement. During the past eight years, we have developed and polished a sophisticated sequence of development events associated with home football games. These include tailgate events hosting 200 or more key donors each game and use of the President's Box in Michigan Stadium to entertain roughly twenty VIPs per game. Football weekend events are coordinated with other key events including the UM-MSU state relations tailgate, Presidents' Weekend events, and events sponsored by other university units (schools and colleges, athletics, etc.)

For most of this period we made extensive use of the hospitality area on the second floor of the pressbox, which gave us an opportunity to entertain roughly 200 development guests who were seated immediately outside in the Stadium. Indeed, this area was specifically designed for such large entertainment functions during and after the game. However, as you know, last year the Regents appropriated this area for their own personal use, so that it is no longer available for general development purposes. Several of them have also had their eyes on the President's Box, but for now it is still under the control of the President and can continue to be used for University purposes.

We have developed a successful system of using the newly renovated space in the Golf Course Clubhouse for tailgates throughout the fall, with the exception of larger events at Chrisler Arena. The staffing is handled jointly by the Offices of Presidential Events and University Events. The invitations are handled by Development.

The President's Box is under the direct control of the President, although proposals for invited guests are made by Development--and usually accepted by the President. In addition, there is a tradition established during the Shapiro years that emeritus presidents are invited to sit in the President's Box, and they have been very helpful in assisting in development activities. Development usually provides the staffing for the box.

Both Anne and I believe that the President's Box was one of our most valuable tools for institutional advancement, since through it we had access to our most important prospects for an extended period of time. While this does make for rather long weekends throughout the fall, it seems part of the territory for most presidents of universities with major athletic programs.

People

The momentum of the University is sustained by an extraordinary group of academic and administrative leaders, including among many:

Executive Officers

- EVPAA and Provost
- EVPCFO
- VP Research
- VP Student Affairs
- VP University Relations
- VP Development
- Secretary
- Chancellor-UMD
- Chancellor-UMF

Deans

- Dean assessment
- Dean dynamics
- New Deans
 - Nancy Cantor
 - Steve Director

Searches

- Executive Officers
- President
- VPCFO

Deans

- Engineering
- Medicine

Chair, Internal Medicine
 Natural Resources
 Pharmacy
 Director of University Libraries
 Directors and Other Senior Staff
 Athletic Director
 General Counsel
 President of UM Health Care System
 Exec Director of Human Relations
 Vice Provosts
 Personal Staff

At your convenience, I will discuss my assessment of the relative strengths and weaknesses of this team.

Key Issues for the Year Ahead

One of the great challenges both to an interim and a permanent president of a complex university such as Michigan is to keep focused on the most important issues facing the institution. At most, a president can pay attention to only a few matters at a time--particularly if in an interim position. It is quite a challenge to avoid the inevitable efforts to pull one into micro-issues that distract from top priorities. This is particularly the case with those political issues and personal agendas (including perks) that swirl about the Regents.

Let me outline what I consider to be the most significant issues for the year ahead. I have starred those that I believe should receive the highest priority from the interim president:

*1. Sustaining momentum through the transition.

It is critical that the president make every effort to hold together the key leadership teams of the University, the Executive Officers and the Deans. But beyond that, maintaining momentum will require a concerted effort to mount effective internal and external communications programs.

2. Key searches and appointments

President
 *VPCFO (Interim)
 VPCFO (Permanent)
 VP-Development
 *Dean of Medicine

*3. Political Attacks on Social Commitments

Affirmative Action
 Gay Rights

Institutional Autonomy

- *4. Restructuring of the UM Medical Center
- 5. Completion of the UMAA Building Program
 - Ongoing Projects
 - New State Projects
 - LS&A, Haven, Mason, Frieze
 - New UM Projects
 - Hill, Rackham, NC Landscaping
 - Athletics Projects
 - Stadium Pressbox, Chrisler
- 6. Completion of Campaign for Michigan
 - Goal for 9/97:
 - Cash: \$1 billion
 - New Bequests: \$300 million
- 7. NCAA Certification

Beyond this, there are a number of issues which require careful monitoring because of their potential risk to the University:

- State/Federal Budget Situations
 - Sustaining adequate tuition revenues
 - Cost containment

- Political Environment
 - Regent campaigns
 - Statewide campaigns
 - National campaigns
 - Attacks on University autonomy

Further, there are a number of particular vexing issues you need to watch very carefully because of their potential for landmines:

- Court politics
 - (particularly involving the deans)
- Intercollegiate Athletics
- Michigan State games
- Legal issues
- OMA/FOIA issues