INVESTING IN THE FUTURE OF FAMU

FAMU Restructuring Plan for 2011-2014

Submitted by

President James H. Ammons
November 24, 2010
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BACKGROUND

Throughout the United States for the last ten years, universities and colleges have reviewed how they are delivering services to students, faculty and other important constituents. Certainly over the last four years, the frequency and intensity of those conversations in public universities have increased in light of state appropriations dwindling and the national economic crisis. Florida has not been immune to these conversations and certainly since this administration began, Florida A& M University (FAMU) has been immersed in these reviews and conversations. Specifically, since the comprehensive reaffirmation process conducted by the University in compliance with SACS standards, disparate conversations and reviews have occurred. There have been conversations related to the comprehensive review of the former strategic plan that resulted in an updated version known as “2020 Vision with Courage.” Further, the Board of Governors (BOG), in accordance with the Chancellor’s vision, has adopted the “New Florida Initiative.” Moreover, the BOG has required the university to outline a five-year “work plan” that the FAMU Trustees approved in spring 2010, and that was submitted to the Board of Governors. While adhering to these requests, the University has been engaged in its own academic program review.

Also, the Trustees and the Leadership Team have been conversing about the budget reductions, loss of stimulus funds, and the adverse impact to the business operations as well as the academic programs. This led to the President recommending that the University increase its extramural funding via University Relations and the Division of Research. With the ever-increasing and continued budget reductions, FAMU has been corolling these conversations into an organized method of review. There is little doubt that painful decisions must occur as well as the reality has settled in that drastic changes must take place. Thus, the University structure as we now know it has to be re-engineered or “restructured” to align with the current realities. At the direction of the Board of Trustees, the University has begun to design a blueprint that outlines a process for
“restructuring” the University in a comprehensive fashion to ensure that they adhere to their fiduciary duties of asking hard questions as they act as stewards of the best interests of the University and its most important outcome—university graduates and alumni. This report provides an outline to guide the discussions at the December meeting of the University.

At the September meeting the Board members expressed the nature of the comprehensive review. The review must address enrollment, revenue streams from all sources, academic programs, and restructuring, but not limited to these topics. In fact, Trustee Dent offered the following comments about his vision of a comprehensive restructuring plan:

- There will be pluses and minuses.
- The future projection of enrollment is critical.
- We need to look at student progression and its financial impact.
- We need to look at the infrastructure to support enrollment growth.
- We also need to look at all revenue sources (grants, fundraising, private giving, etc)
- Academic restructuring is needed.

Therefore, to put the restructuring in context, this outline begins with a review of the revenue streams into the university in a comprehensive manner. Then we will look at the expense side of the ledger beginning with FY 2011-12 and expenditures. We will outline the legislative priorities and the key areas that the Board of Governors expects FAMU to address in the overall “New Florida Initiative,” which was designed to address critical state needs. We hope that as we engage in discussions that this backdrop remains at the forefront of our minds. These priorities were identified because they align with the University’s strategic plan.

**FAMU’s MISSION STATEMENT:**
*Florida Agricultural and Mechanical University (FAMU) is an 1890 land-grant institution dedicated to the advancement of knowledge, resolution of complex issues and the empowerment of citizens and communities. The University provides a student-centered environment consistent with its core values. The faculty is committed to educating students at the undergraduate, graduate, doctoral and professional levels, preparing graduates to apply their knowledge, critical thinking skills and creativity in their service to society. FAMU’s distinction as a doctoral/research institution will continue to provide*
mechanisms to address emerging issues through local and global partnerships. Expanding upon the University’s land grant status, it will enhance the lives of constituents through innovative research, engaging cooperative extension, and public service. While the University continues its historic mission of educating African Americans, FAMU embraces persons of all races, ethnic origins and nationalities as life-long members of the university community.

VISION STATEMENT
Florida A&M University (FAMU) will be internationally recognized as a premier land grant and research institution committed to exemplary teaching, research, and service preparing transformational graduates with high ethical values dedicated to solving complex issues impacting our global society.

During the last academic year, Chancellor Brogan and the Board of Governors (BOG) mandated that the eleven universities within the State University System (SUS) prepare and submit “Work Plans.” These plans are multi-year (2010-15) outlines that identify the institutional priorities and will become the basis upon which the universities’ progression is monitored and budgeting priorities are noted. These priorities had to align with each university’s respective strategic plan as well as the Board of Governors Strategic Plan. The Board of Governors’ Strategic Priorities are:

- Access to and Production of Degrees
- Meeting Statewide Professional and Workforce Needs
- Building World Class Academic Programs and Research Capacity
- Meeting Community Needs and Fulfilling Unique Institutional Responsibilities

In light of these BOG priorities (which were approved after the FAMU Board of Trustees approved the FAMU Strategic Plan), we have aligned the University’s work plan goals to the above BOG goals. The FAMU Work Plan’s key priorities for the first year only and in order of priority (per BOG directions) are:

1. Enhance Visibility and Productivity as a Doctoral/Research University;
2. Increase University Activities to Address Health Care Disparities Among Underserved Populations;
3. Increase the persistence/retention rates of undergraduate students, leading to increased graduation rates;
4. Initiate On-line Academic Programs; and
5. Increase International Opportunities for Faculty and Students.
While we are working to achieve these goals, the University must restructure itself. No longer can FAMU be good at everything. Budget constraints mandate that we focus upon our strengths in academic programs, business operations and attracting extramural funding into the university to offset the diminishing state appropriations. Over the past two (2) legislative budget cycles, the academic enterprise had been protected. Stimulus funds were used to buffer the impact of the cuts and we used guiding principles for the two previous rounds of budget reductions.

As a member of the State University System, FAMU must organize its budget in compliance with budget guidelines designated by the Board of Governors. Our legislative priorities for 2011-12 were reviewed and approved by the Board of Trustees at the June meeting and were submitted to the Board of Governors. The 2011-12 Legislative Budget Request (LBR) is the same as the above FAMU Work Plan goals.

Although we have referred to those guiding principles, the loss of stimulus funds, the request to reduce our budget by 15% for July 1, 2011, and the need to divest in low productivity academic programs and reinvest in our strengths require a new perspective to guide our work. The staff has been directed to:

• Reduce administrative costs,
• Eliminate low productivity programs,
• Reduce duplication in course offerings,
• Reduce duplication in administrative processes,
• Reduce energy costs,
• Implement private sector expertise where appropriate, and
• Increase revenue.

ADDRESSING THE UPCOMING FISCAL YEAR AND BUDGET REDUCTIONS

Revenue Streams
With the above context of the external mandates, the current conditions surrounding the University are established. As you know, since 2007, the University has experienced a $35 million reduction to its budget. Now, the University must address the potential 15% projected cut which could result in a $13.3 million reduction for FAMU in fiscal year 2011-12. This reduction will occur in addition to the loss of $7.9 million in stimulus funding. This section will review and note the current and future revenue projections. Until the legislature
In the spring of 2011, we cannot know with any certainty our state each year by 15%. The chart below includes all revenue streams from all sources within the University.

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<tbody>
<tr>
<td>Educational and General Appropriations:</td>
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</tr>
<tr>
<td>General Revenue</td>
<td>95,216,434</td>
<td>5,864,472</td>
<td>89,353,962</td>
<td>80,418,566</td>
<td>80,418,566</td>
<td>80,418,566</td>
</tr>
<tr>
<td>Educational Enhancement (Lottery)</td>
<td>11,720,688</td>
<td>-</td>
<td>11,720,688</td>
<td>11,366,967</td>
<td>11,027,995</td>
<td>11,027,995</td>
</tr>
<tr>
<td>Student Fee Trust Fund - In-State</td>
<td>41,656,489</td>
<td>-</td>
<td>41,656,489</td>
<td>47,001,674</td>
<td>55,090,736</td>
<td>63,354,312</td>
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<tr>
<td>Student Fee Trust Fund - Out-of-State (net of waivers)</td>
<td>11,318,509</td>
<td>-</td>
<td>11,318,509</td>
<td>11,318,509</td>
<td>11,318,509</td>
<td>11,318,509</td>
</tr>
<tr>
<td>Student Fee Trust Fund - Carryforward</td>
<td>6,205,140</td>
<td>-</td>
<td>6,205,140</td>
<td>6,205,140</td>
<td>6,205,140</td>
<td>6,205,140</td>
</tr>
<tr>
<td>Student Fee Trust Fund - Other Fees</td>
<td>627,051</td>
<td>-</td>
<td>627,051</td>
<td>627,051</td>
<td>627,051</td>
<td>627,051</td>
</tr>
<tr>
<td>Federal Stimulus Funds</td>
<td>8,450,902</td>
<td>-</td>
<td>8,450,902</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>175,037,231</strong></td>
<td><strong>5,864,472</strong></td>
<td><strong>169,172,759</strong></td>
<td><strong>157,643,294</strong></td>
<td><strong>164,487,867</strong></td>
<td><strong>172,751,972</strong></td>
</tr>
</tbody>
</table>

Other Student Related Fees:
- **Technology Fee**: 1,916,580
- **Activity and Service Fee**: 3,884,970
- **Financial Aid Fee**: 3,143,535

**Total**: 8,945,985

Auxiliary Revenues (excluding athletics):
- **Housing Revenues**: 10,917,772
- **Other Auxiliaries**: 12,579,293

**Total**: 23,597,065

Contracts and Grants:
- **Federal**: 48,169,253
- **State**: 2,219,776
- **Local and Non-governmental**: 2,827,537
- **Research Overhead Earned**: 6,537,917

**Total**: 58,754,482

Estimated Fundraising (Foundation):
- **Athletics**: 486,000
- **Distance Learning**: 486,000
- **Total Projected Revenues**: 266,293,945

Please note:
1. General Revenue reduced by 10% FY 2011-12 and hold constant thereafter
2. Lottery decreased by 3% in FY 2011-12 and 2012-13 and hold constant thereafter
3. Student Fee - In-state increased 15% every year
4. Student Fee - Out-of-State, carryforward, and other fees held constant
5. Technology and Financial Aid Fee increased by 8% every year
6. Activity and Service Fee increased by 5% FY 2011-12 and hold constant thereafter
7. Auxiliary revenues increased by 4% every year
8. Contracts and Grants increased by 7% annually

The chart denotes the significant impact the loss of stimulus funding has on the E&G budget. Further, fees, auxiliaries, research, donations, contracts and grants revenue streams are more restrictive in nature and provide little to address the budget reductions. As the chart notes, the only areas in which significant revenues may accumulate for the University are in the tuition, research overhead, and foundation revenue streams. Therefore, enrollment growth must continue since it provides the most significant increase in the university’s revenue stream.

Continuing to increase enrollment also means that we must continue to increase tuition at the maximum levels; currently that means a 15% each year for the next
five (5) years. Further, the Board of Governors has permitted campuses to request market rate tuition for certain high demand programs. Therefore, the University will explore and seek approval from the Board of Trustees and the Board of Governors for market rate tuition for three (3) programs, namely College of Pharmacy and Pharmaceutical Sciences, College of Law and the Doctor of Physical Therapy. Preliminary reviews disclose that our tuitions in these programs are significantly lower than other programs in Florida. While these increases may present a challenge for some of our students and their families, the recent increase in Pell Grant funding as well as our continued work with donors and corporate supporters for scholarship funding will help offset these costs as much as possible. As the chart notes, we seek to increase our unrestricted fundraising efforts to $2 million each year over the next five years. At a time when many corporations have curtailed their donations, this modest goal is realistic in light of the nation’s economic state. Further, we continue to emphasize with faculty the need to increase their research, contract and grant proposals with federal and private entities to offset many operational costs that the University cannot continue to bear. Our goal is to increase research productivity by 7% in total awards received over those received in 2009-10.

**RECOMMENDATION:** Therefore, we must continue to increase our tuition by 15% for the foreseeable future to ensure significant revenue for the University in light of continued reductions in state appropriations.

**Expenditures and Reductions 2010-2011**

**Guiding Principles**

During the earlier budget reductions, the University’s review was led by 13 guiding principles. Below is the list of these principles:

1. Submit a Balance Budget
2. Maintain our 5% statutory requirement for reserve
3. Maintain compliance with state laws, policies and regulations (internal controls)
4. Teaching is the highest priority and faculty layoffs last resort
5. Health and Safety of the campus must not be sacrificed
6. Preserve admission, financial aid, and registrar offices
7. Review non-instructional activities in light of mission and productivity
8. Develop efficiencies in the university’s administrative areas as we leverage technology and ensure greater delivery of services to our students and vendors
9. Review our academic programs that are critical to the mission of the University AND exhibit high productivity in enrollment, graduation, research, service and teaching
10. Maintain highly productive accredited programs
11. Identify new sources of revenue
12. Institute a robust distance learning program
13. Use the strategic plan to accomplish multi-year goals

As we examine the overall budget, the overwhelming majority (nearly 78%) of the expenditures are in salaries and benefits. Therefore, personnel within the university can no longer be protected from the budget reductions. Most of the non-critical vacant positions within the University have been eliminated. Although cost-savings from travel restrictions, selected hiring freezes and eliminating expense budgets for every unit assisted us in the past, these are not available for us to address the upcoming year of budget reductions. Therefore, personnel reductions must occur.

As noted earlier, various initiatives and conversations have occurred over the last two years that address this current situation. These include a review of the productivity of all academic programs, a reorganization of the academic structure, as well as the elimination of three (3) non-instructional units. Each of these will be discussed below.

**Divestments:**

- **Stimulus Funding:**
  
  **Non-Instructional Units**
  
  The University experienced budget reductions for three consecutive years beginning in 2007-08. The assistance of federal stimulus funds was a welcomed relief to buffer the impact of the drastic reductions in personnel and programming at the University. Although welcomed, the University recognized the eventuality of these time limited funds which dictated a careful and thorough review of positions and programs that were supported with these funds. The original guiding principles protected instruction; but, transferred some non-instructional units into the stimulus funded category. Thus, three (3) units were identified and included:
  
  - The Mulrennan Laboratory, Panama City
  - The School of Graduate Studies
  - The School of General Studies
The staff members within these units were provided timely and appropriate notice of their status in positions supported by stimulus funds and advised that once this funding ended, the programs and personnel would not have any additional funding. Therefore, these units, as currently constructed, would end unless extramural funding was generated by the units to support their work.

Moreover, the functions within Graduate Studies and General Studies have been absorbed by other areas. Much of the work of Graduate Studies has been redistributed to the various schools and colleges that have historically reviewed and admitted graduate students to their respective areas. Likewise, the creation of the Office of Retention and Graduation will absorb the work that was performed by General Studies. See the chart below.

<table>
<thead>
<tr>
<th>General Studies Current Functions</th>
<th>New Responsibility Areas</th>
<th>Technology Support</th>
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</thead>
<tbody>
<tr>
<td>Academic Advising</td>
<td>Office of University Retention/Colleges,</td>
<td>Academic Advising Module</td>
</tr>
<tr>
<td></td>
<td>Schools, Institute</td>
<td>Student Identification</td>
</tr>
<tr>
<td>College Level Achievement Skills (CLAS)</td>
<td>Testing Service Bureau</td>
<td>Student Tracking</td>
</tr>
<tr>
<td>College Preparatory (C-Prep)</td>
<td>Academic Units (Mathematics and English)</td>
<td>Academic Support Services</td>
</tr>
<tr>
<td>Study Skills Center</td>
<td>Writing Resource Center</td>
<td>Blackboard</td>
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<tr>
<td></td>
<td>The Math Lab</td>
<td>Advisor People Soft Access</td>
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<tr>
<td></td>
<td>Engineering and Science Support</td>
<td>Online General Bulletin</td>
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<tr>
<td></td>
<td>Chemistry Tutorial Center</td>
<td>On-line Change of</td>
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<tr>
<td>Upward Bound Math and Science</td>
<td>Continuing Education / Office of University Retention</td>
<td></td>
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</tbody>
</table>
As of July 1, 2010, the functions of the current School of Graduate Studies and Research will be assumed by the position of Assistant Vice President of Sponsored Research and Dean of the School of Graduate Studies. This position will be housed in the Office of Sponsored Research and the Office of Academic Affairs.

<table>
<thead>
<tr>
<th>Graduate Studies Current Functions</th>
<th>New Responsibility Areas</th>
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<tbody>
<tr>
<td>Recruitment</td>
<td>*GS/OR</td>
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<tr>
<td></td>
<td>*Academic Units</td>
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<tr>
<td>Admission</td>
<td>*GS/OR</td>
</tr>
<tr>
<td></td>
<td>*Academic Units</td>
</tr>
<tr>
<td>Assistantships</td>
<td>*GS/OR</td>
</tr>
<tr>
<td>Health Insurance Coordinator</td>
<td>*GS/OR</td>
</tr>
</tbody>
</table>
Please note that there are no cost savings to this action because the funding source ends. These reductions were included in the current year of 2010-11.

**Other stimulus supported positions**
There are approximately 110 FTEs supported by stimulus funding; however, this does not include the adjunct faculty or other temporary employees. These positions involve all levels of personnel from clerical to high level administrators (including an Associate Vice President) and they were given the appropriate notice. Effective June 30, 2011, this funding will end.

The American Association of University Professors (AAUP) is known for outlining the “best practices” for addressing faculty concerns within colleges and universities. The AAUP has even developed a website that answers many of the common questions raised by the financial crisis that many universities find themselves facing as well as the legal concerns inherent in these considerations. See American Association of University Professors, *Financial Crisis FAQs*, http://www.aaup.org/aaup/financial/mainpage.htm. Therefore, we must ensure that faculty with tenure receive all benefits to which they are entitled. There are ten (10) tenured faculty members within the academic units that have been placed on stimulus funds (3 in General Studies; 2 in Academic Affairs; 1 in Graduate Studies; 4 at the Mulrennan Lab). The University will ensure that any tenure rights are addressed. See Appendix A, Memorandum from Attorney Linzie Bogan, dated November
10, 2010. The current graduate dean will be moved to a joint position between the Division of Research and the Division of Academic Affairs, to continue the operation of graduate studies as described above.

Since the time they were placed on stimulus funding, all members of the academic units, including USPS and A&P personnel, have been regularly notified by the Human Resources Office of available positions within the university. They are encouraged to apply for positions for which they are qualified. As dictated by university regulation, USPS employees will have rights of first recall should such opportunities occur in the future.

Please note that there are no cost savings to the stimulus funded positions because the funding source ends also. These reductions were included in the current year of 2010-11.

Addressing the Budget Reduction for 2011-2012
As noted earlier, the University must divest and reduce its budget by $13.3 million, effective July 1, 2011. Since personnel comprise nearly 78% of the total operating budget, this is the primary source for budget reductions. The University has been engaged in low productivity reviews, academic restructuring or realigning of academic units and colleges. While this work is underway, there is more work that must occur; however, there are also some areas that we can divest from in the next year that will yield some cost-saving to apply to the reduction.

A. High Productivity/Low-Productivity Academic Programs
   Process for Identifying Low Productivity Programs
In Spring 2009, the Academic Affairs leadership including the Provost, assistant vice presidents, the academic affairs fiscal manager and the associate vice president for institutional effectiveness initiated the process of determining the productivity levels of the academic programs within the university. This was deemed necessary as we addressed issues of both efficiency and effectiveness. The initial task of the work group was to develop a process for assessing the multiple variables that contributed to programs experiencing high or low productivity. As a result of these discussions within the work group and with the academic deans, it was concluded that data in the following areas would be considered:

- Enrollment
• Degrees Awarded
• Student FTEs
• Level of Scholarly Productivity through Sponsored Research
• Relevance to the University Mission

All academic programs were rated based on the above criteria which led to a composite score for all programs. Programs with low scores, possibly indicative of low productivity, were addressed first. All aspects of the low scoring programs were reviewed. Deans and department chairs were provided with the scoring results and were provided with opportunities to provide additional data to justify outcomes in the identified arenas that emerged with low scores. This process occurred over a period of eight (8) months. It is important to note that the work group, in conjunction with the deans, recognized that the concept of academic productivity in higher education is a complex one. Group discussions as well as discussions with the deans consistently reinforced the importance of:

• Programs identified as critical by the Board of Governors;
• Programs that reinforced the mission of the university;
• Programs that represented the strengths of Florida A&M University; and
• Programs that provided significant potential for the future growth and directions of the university.

As a result of all of the information being analyzed, it became evident that some programs might indeed fall into a category of low or high productivity. In actuality, as a preliminary approach to reviewing the results of the productivity analysis, the Work Group has now divided all of the university programs into one of four arenas: high need/high productivity; low need/high productivity; high need/low productivity; low need/low productivity. Although it is possible that these categories may lead to recommendations of moving specified programs to termination or dormancy, the attached flow chart describes the decision-making process that was utilized.

As the university community engages in discussions and information sharing regarding restructuring and reorganization of the academic programs, the outcomes and actions related to programs that have low productivity will be included in those discussions. It is anticipated that the first quarter of 2011 will allow multiple opportunities for the university community to engage in discussions related to reorganization in general as well as how it might relate to low productivity. It
must be remembered, if recommendations are presented about terminating or closing programs, that considerations such as number of enrolled students and length of time to “teach out” students must be considered. There may indeed be a gap of one to two years before a program that is recommended for closure is actually able to close. The process for assessing program productivity will continue and will be included in discussions about university reorganization. Final recommendations are expected in Spring 2011.

As noted above, although programs have been identified for becoming dormant, there are several factors that require careful and thorough vetting with faculty members before program closure may occur. The American Association of University Professors (AAUP) is known for outlining the “best practices” for addressing faculty concerns within colleges and universities. The AAUP has even developed a website that answers many of the common questions raised by the financial crisis that many universities find themselves facing as well as the legal concerns inherent in these considerations. See American Association of University Professors, Financial Crisis FAQs, http://www.aaup.org/aaup/financial/mainpage.htm.

Further, colleges and universities are encouraged to act prudently. “In addition to timely consultation with faculty, the AAUP has often focused on transparency of decision-making and the sharing of information.” See, Jonathan R. Alger, Restructuring, Retrenchment and Reduction in Force in an Economic Downturn, (Senior Vice President and General Counsel, Rutgers, the State University of New Jersey, October 18, 2009). Our goal at FAMU is to be a model university of shared governance. In his paper, Attorney Alger outlines several important considerations related to faculty to include:

- Collective bargaining agreements which outline the terms and conditions of employment
- Tenure and contracts and the impact of “layoffs” on recruitment and retention of faculty over time
- Rights related to salary reductions and furloughs
- Hiring freezes
- Program Reduction or Elimination

Moreover, when reviewing academic programs, Alger notes, 

*Some programs may be worth keeping because institutions of higher education are guardians of our cultural heritage as well as developers of*
innovations and ideas in areas that can have a long-term (if not immediately obvious or economically viable impact. (p. 8)

Therefore, the University should solicit input from faculty beyond those on the committee and across the University about these proposed measures for terminating or placing programs in a dormant state before recommending specific programs for board approval.

Most institutions of higher education will presumably be around for many decades to come, and we must do our part to ensure whenever possible that they are built to reflect that long-term perspective and the interest associated with it. (Algers, p. 10)

Another byproduct of this productivity review has been the emergence of high productivity programs that are in high demand among the state and nation’s workforce and research needs. See the Appendix for Methodology. Eighteen (18) programs continue to have high enrollments, graduation rates, research productivity and meet statewide workforce needs; therefore, the University should consider preserving these programs and investing in their vitality when resources become available. Finally, there are those programs in the high need-low productivity quadrant or the low need-high productivity quadrant that need additional review. The University will continue to analyze these programs to determine if better efficiencies may result from program consolidations, realignments or dormancy status. The goal will be to adhere to all faculty rights and obligations, notice requirements and to strengthen the resulting units to meet the global and state needs for competitive graduates from these programs.

RECOMMENDATION: The University will take measures to determine the low productivity programs for dormancy or termination to achieve future cost-savings while complying with University policies, procedures, collective bargaining agreements, state and federal laws.

B. Academic Administrative Services
A review of the academic budget disclosed areas where strategic reductions could occur to assist in addressing the necessary budget reductions. Academic administrative services consist of employees that provide support to the academic units. Employees within this category include Administrative and Professional (A&P), University Personnel and University Services (USPS) and those in time-limited/temporary personnel (OPS).
The initial reorganization will occur with vacant positions. The University would bring all vacant positions currently within this category into centralized pools within each division. Positions could be reallocated to offices and units within the division upon written justification to and approval by the divisional vice president. The A&P employees will continue to support the administrative portion of the departments and work in concert with revised business operations or Administrative Service Assistance Program (ASAP) Unit functions. The ASAP functions are described in the next section.

The USPS employees will provide coordinated, efficient administrative and secretarial support for Deans, Directors, Chairs, Faculty and Students. The USPS employees will be strategically distributed within the schools and colleges as a unit to maximize efficiencies and administrative processes for requested services.

Upon review, it was determined that the following actions could occur while providing the appropriate legal notice of termination, to effectuate $6 million in reductions. These include but are not limited to the following duties:

- Receives and screens telephone calls and visitors; assists visitor or caller by answering questions or providing information
- Types/word processes, formats and proofreads materials such as manuscripts, technical documents, forms, vouchers
- Organizes, establishes and maintains record-keeping systems for correspondence, documents, materials or records for an administrative function; sets up files; records or logs incoming information and follow-up on missing or incomplete information.
- Schedules appointments for Dean, Directors and Chairs as directed utilizing knowledge of priorities and prearranged plans; prepares daily itineraries and assembles necessary background materials for supervisor
- Assembles, researches and summarizes information from various resources; compiles data or calculates simple statistics to prepare special or recurring reports for Dean, Directors and/or Chairs as required
- Prepares periodic reports and submits to supervisor along with recommendations or simple analyses
- Arranges meetings, schedules conferences, facilities and services as directed by Dean, Directors and/or Chair, and notifies attendees or participants of time and place.
- Assembles and distributes documents, forms and general information requested by visitors, clients, contractors.
In addition, USPS employees will be cross-trained to work in all departments at the university. Thus, they may be based in one department but flexible and skilled to be assigned to other units depending on need.

The above actions will result in a 40% reduction of the academic administrative staff and generate $6.0 million in cost savings.

RECOMMENDATION: The University will reduce selected areas within Academic Administrative Services to glean $6 million dollars in cost savings.

C. University Support
Finally, budget reductions can result from the implementation of more efficient business operations across the campus. These reductions hinge upon leveraging our technology modules and customizing them to meet our current needs. Converting our current modules into robust and customized systems that meet the current and future needs of the various divisions across the University is the key to success in this area. Such efforts will streamline operational processes such as travel, e-procurement, and the comptroller’s office. Although these enhanced technologies would reduce the functions performed by some staff, it would further reduce the manual intensive processes that we currently experience across campus. Further, it would reduce unnecessary duplication of administrative cost and processes.

The FAMU Leadership Team has endorsed an improvement effort that is currently underway in the Division of Administrative and Financial Services (DAFS). The Transformation through Technology Enhancements (T3E) project will leverage fully the capabilities of our PeopleSoft system so that we can dramatically improve our core business processes. Successful completion of this project will result in significant improvements in major systems like hiring, accounts payable, purchasing, cash management, travel, and asset management. These improvements will benefit every unit of the University. As a result of this project, we expect:

- Faster processing of travel reimbursement requests
- More efficient and timely purchasing processes
- More efficient and timely payment of bills
- Better control and management of assets
- Better streamlined recruitment and hiring of employees
- Greatly simplified financial statement development
- Efficient and effective overall financial management and reporting processes
Our current conditions mandate immediate attention to this area. Drastic and decisive action must occur in our technology, student affairs, and financial areas and within the President’s Office. I have discussed this matter with the vice presidents of these respective divisions and will proffer a plan of action at the December meeting for positions supported by E&G Funds. However, a preliminary review discloses:

The Administrative Assistance Service Program (ASAP) will be established to assistance both administrative and academic units in all business processes. Services provided include: standardized management reports, budget monitoring, processing all personnel actions to ensure accuracy and timeliness of salary payments, one point of contact for all business process transactions, reconciliation of all department accounts, travel and expenses transactions, payroll certification, vendor oversight and payments, review of internal controls, etc.

All personnel in the ASAP will be cross-trained as well as specialized for assigned department(s)/unit(s). Staff will also be required to be trained and certified to work in the unit. Classes for ASAP will be required and provided every other month. The unit will also have a website, job-aid tools, help-desk services, monthly meetings with department(s)/unit(s).
RECOMMENDATION: The University will reduce the University support budget to glean $13.8 million dollars in cost savings.

RESTRUCTURING PLAN 2012-14
The above reductions only address the most immediate reduction of 15% that the University has to prepare to handle on July 1, 2011. However, we anticipate that similar cuts will continue over the next two (2) years. Therefore, we will continue to review the program productivity areas. We are preparing to adjust our academic program reviews as well as make adjustments to the senior level administrative positions. Also, we will refine the organizational analysis that has occurred within the Division of Academic Affairs. See Appendix C. Further, we must continue our refinements to the technology, which will lead to even greater operational
savings. In the course of these reorganizations, we must provide adequate notice and assess our next round of strategic reductions. Further, we must await the direction of the legislature to determine the extent of future reductions. However, if these reductions are less than anticipated, then we will begin to reinvest our cost reductions in the identified areas of areas of strength. Since this is an iterative process, we will continue to update you on our thinking; however, below are scenarios of future restructuring:

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<tr>
<th>2012-13</th>
<th>2013-2014</th>
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<tbody>
<tr>
<td>Reorganize academic structure</td>
<td>“Best in Class” in focused areas</td>
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<tr>
<td>Outsource selected service areas</td>
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<tr>
<td>Maximizing technology</td>
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**RECOMMENDATIONS**

As discussed in this report, the recommendation below will address the anticipated 15% cut for the fiscal year of 2011-12:

- **The University must continue to increase tuition by 15% for the foreseeable future to ensure significant revenue for the University in light of continued reductions in state appropriations.**
- **The University will take measures to determine the low productivity programs for dormancy or termination to achieve future cost-savings while complying with University policies, procedures, collective bargaining agreements, state and federal laws.**
- The University will reduce the administrative support (A&P and USPS) by approximately $13 million.
- If cost reductions are less than 15%, then the University will use the savings to reinvest funds into the strategic priorities outlined in the work plan and the University strategic plan.

**CONCLUSION**

As this report outlines, the University has been engaged in conversations and work to restructure the University over the last three years. The dwindling and continuous decline of state appropriations requires the University to make many difficult decisions to reduce our expenditures. While initial budget reductions preserved jobs, such will not be the case in the upcoming academic year and the foreseeable future if the University is asked to continue to reduce its budget.
annually. The University has set goals to increase revenue by enrollment growth, research, and increased donations. However, since the majority of our expenditures are found in salaries, academic program reorganizations and academic administrative service reductions will mean substantial reduction in our workforce. Where faculty are involved, the University must adhere to collective bargaining agreements, tenure rights and other BOT, BOG, state and federal rules and regulations. As president, I am committed to working with the Board of Trustees as we restructure the University during these difficult economic times that will ensure a bright future for Florida A&M University.

APPENDIX A

MEMORANDUM FROM ATTORNEY LINZIE BOGAN
Dated November 10, 2010
MEMORANDUM

CONFIDENTIAL AND PRIVILEGED
ATorney Client COMmunication

TO:    James H. Ammons, President,
       Cynthia Hughes Harris, Provost and Vice President for Academic Affairs

THROUGH:  Avery D. McKnight  
           General Counsel

FROM:  Linzie F. Bogan  
        Associate General Counsel/Director of Labor Relations

SUBJECT: Personnel Restructuring

DATE: November 10, 2010

As additional budgetary reduction measures are contemplated, the Office of the General Counsel would like to take this opportunity to highlight a few issues that will hopefully minimize the University’s exposure when legal challenges to our cost saving measures are initiated.

1. Layoff Units for Faculty.

Florida SUS institutions have experienced faculty layoffs that have resulted in legal challenges initiated by the union. One of the common union strategies when challenging layoff decisions is to argue that the University did not properly define an employee’s layoff unit. This argument is currently being advanced by the UFF in the grievances filed against FAMU on behalf of employees from Graduate Studies, the Mulrennan Lab, and General Studies.

FAMU IS AN EQUAL OPPORTUNITY/EQUAL ACCESS UNIVERSITY
Article 13.1 of the Collective Bargaining Agreement between the FAMU BOT and UFF (CBA) gives the University broad discretion and authority when determining an organizational level which will constitute a layoff unit. Specifically, the CBA provides that “[t]he layoff unit may be at an organizational level of the University, such as a campus, division, college/unit, school, department/unit, area, program, or other level of organization as the University deems appropriate.” It is important to remember, as noted in the previously disseminated “Guiding Principles” information, the foundation of layoff decisions is constructed of two major components: (1) defining the layoff unit; and (2) identifying individuals within the layoff unit.

When defining the layoff unit, one of the things noted by the FSU arbitrator that warrants some emphasis, is the arbitrator’s opinion that “academic programs,” in terms of course offerings, have nothing to do with the “administrative organization” of the University. In other words, according to the arbitrator, the layoff article “contemplates an administrative rather than a purely academic organizational component” and an administrative organizational component is a “functionally separate entity that can stand alone organizationally.” In determining whether an academic “program” constitutes an “administrative organization” of the University as required by the Collective Bargaining Agreement, the arbitrator looked to several factors, including: 1) does the program have its own financial designation unique to that program; 2) does the program have an administrative official (e.g., Dean or Director) that signs annual evaluations for faculty; 1) does the program have its own separate salary budget; and 4) how is the program described in accreditation documents, and in the University’s catalogue. This list is certainly not exhaustive, but it illustrates some of the indicators that should be considered when identifying a “unit” for purposes of layoffs as contemplated by the Collective Bargaining Agreement.

Once the layoff unit is defined, the next question is identifying individuals within the layoff unit. When determining whether an employee is in a particular layoff unit, the University may look to several factors, including but not limited to, where the faculty member is tenured, descriptive information set forth in the University’s catalog and webpage, faculty committees that the employee served on, the area where students may have been supervised by the faculty member, courses taught, and departmental tenure and promotion committees served on by the faculty member. Most decisions may not require this level of analysis, but there will likely be instances where a faculty member’s unit cannot be identified by simply asking the question; “where is the faculty member’s tenure home.” Also, it is worth noting that the FAMU Collective Bargaining Agreement provides that “tenure shall be in a department/unit or other appropriate administrative unit.” It is not clear in some instances where the tenure home of some
FAMU faculty members is located. This office previously raised concerns regarding this issue during the 2009-2010 academic year.

As you may know, on Friday, November 5, 2010, FSU was ordered by an arbitrator to reinstate several tenured faculty members that had received layoff notices. In the grievances filed on behalf of some twenty-three FSU faculty members, the Union alleged that FSU violated the Collective Bargaining Agreement by: 1) failing to provide proper notice of layoffs; 2) failing to properly specify the layoff unit; 3) failing to properly apply layoff criteria; and, 4) improperly enacting layoffs as non-reappointments for non-tenured faculty members. A copy of the decision is attached for your consideration. The arbitrator found no violations as to issues 1 and 4, but did find that FSU violated its Collective Bargaining Agreement when it failed to properly identify the layoff unit and failed to properly apply layoff criteria. It is important to note that the Arbitrator’s decision in the FSU case is not binding on FAMU but may offer additional guidance as future possible layoffs are considered. In reading the FSU arbitration decision, it is quite clear that the layoff decisions made by FSU were motivated in large part by a desire to target some individuals while protecting others. As previously noted in our Guiding Principles, this is not what layoff decisions should be about.

2. Re-employment/Recall

As the University makes its way through this process, it is important to remember that the faculty collective bargaining agreement requires that the University “provide information to laid off employees regarding vacancies within the University” and that the University, for a period of two years following layoff, offer to laid off employees, regardless of tenure status, “re-employment in the same or similar position... should an opportunity for such re-employment arise.” In some of the recent layoff arbitration decisions, one of the arguments advanced by the UFF is that Universities have not satisfied their obligation of identifying similar employment for the laid off faculty member as required. So as to avoid this possible pitfall, one of the things that we may want to consider is setting up some process whereby Academic Affairs can review all position vacancy announcements and reconcile the requirements of vacant positions with the credentials of the laid off faculty members. Succinctly stated, if we are challenged as to this requirement, it would help the University’s case to be able to demonstrate that the University took affirmative steps, pursuant to an established process, to help affected faculty find suitable alternative employment within the University.

As an additional matter of consideration, Section 15.7 of the CBA provides that a tenured faculty member may seek a transfer with tenure through the normal hiring
process within the University to a vacant position in the same or similar position.” As we move closer to the time when these realignment/elimination considerations become reality, the University may start to see instances where, in anticipation of possibly being laid off, tenured faculty members apply for vacant positions in other academic units on campus.

3. The Use of Adjunct Faculty

A question was recently posed regarding the use of adjunct faculty to “teach out” students in departments/units where regular faculty have been laid off. Section 13.2(g) of the CBA provides in relevant part that “the University shall notify the local UFF Chapter in writing regarding the use of adjunct and other non-unit faculty in those departments/units where employees have been laid off.” Clearly, this language contemplates and authorizes the scenario where adjunct faculty members are used to replace laid-off faculty. A variation of this alternative lies in the scenario where the department/unit desires to offer adjunct employment to a former regular faculty member that has been laid off. The CBA does not prohibit offering adjunct employment to a laid off faculty member. If this scenario plays out, and assuming that the laid off faculty member accepts adjunct employment, then it is the opinion of this Office that the laid off faculty member would still retain his/her two year recall rights because adjunct employment would not be employment in the “same or similar position” as contemplated by the two year recall language found in Section 13.5 of the CBA. It is clearly a policy question as to whether laid off faculty should be “offered” adjunct employment.

CONCLUSION

It cannot be stressed enough that the personnel restructuring process is not about targeting individual employees for termination. The process instead has to be about identifying those functions and organizational units that can no longer be sustained or supported. Additionally, as the possible termination of academic programs is considered, special consideration should be given to ensuring that such decisions are made within the framework set forth by applicable BOT, BOG and accrediting agency standards (e.g. BOT Regulation 4.005). Please know that the Office of the General Counsel stands ready to assist as appropriate.
APPENDIX B

Productivity Study of Academic Programs

Decision Tree

(See Attached Paper)
APPENDIX C

REPORT OF THE ORGANIZATIONAL TASK FORCE
METHODOLOGY AND PROCESS
REPORT OF THE ORGANIZATIONAL TASK FORCE

METHODOLOGY AND PROCESS

NOVEMBER 2010

INTRODUCTION

On October 20, 2008, Provost Cynthia Hughes Harris appointed an Organizational Analysis Task Force of Faculty, Deans and Administrators to examine the current academic organizational structure of the academic units of the university. Provost Harris charged the task force to “review the effectiveness” of the manner in which the Florida A&M University academic programs are housed. Specifically, the task force was asked to “confirm the appropriateness of the existing organizational structure of our academic units or to provide recommendation of alternative structures that would strengthen the university” and its commitment to academic growth and integrity.

The task force was chaired by Rodner B. Wright, AIA, Dean of the School of Architecture, and consisted of a total of 34 members from the following Colleges and Schools and administrative areas: College of
**Arts and Sciences:** Dr. Genyne Boston, Associate Professor, Department of English, Dr. Shelby Chipman, Associate Director, Department of Music, Dr. Merlin Langley, Professor, Department of Social Work, Dr. Adrian McCollum, Assistant Professor, Department of Biology, Dr. Gary Paul, Associate Professor, Department of History, Dr. Elliott Treadwell, Professor, Department of Physics, Mr. Luther Wells, Professor, Department of Visual Arts; **College of Education:** Dr. Genniver Bell, Dean, Dr. E. Newton Jackson, Jr. (*Jackson State University*) Associate Dean/Associate Professor, **College of Engineering (FAMU-FSU):** Dr. Clayton Clark, II, Assistant Professor, Civil Environmental Eng., Dr. Reginald Perry, Associate Dean/Professor, Electrical & Computer Eng.; **College of Engineering Sciences Technology & Agriculture:** Dr. Ogheneke Onokpise, Associate Dean/Professor, Dr. Verian Thomas, Director/Professor, Agricultural Sciences; **College of Pharmacy and Pharmaceutical Sciences:** Dr. Frank Emmanuel, Professor; Dr. Cynthia M. Harris, Director, Institute of Public Health, Dr. Ken Redda, Professor, Basic Sciences; **School of Allied Health Sciences:** Dr. Barbara Mosley, Dean, Dr. Eric Toran,), Interim Director, Physical Therapy, (*Declined participation with task force*)

**School of Architecture:** Roy Knight, Professor, Dr. Richard Rome, Director of MLA (*Retired*) **School of Business and Industry:** Dr. Sandra Drumming, Associate Professor, Department of Accounting; Dr. Daaim Shabazz, Associate Professor, Department of International Business; **School of General Studies:** Mr. Harold Henderson, Professor, Dr. Lisa Lang, Professor; **School of Journalism/Graphic Communication:** Dr. Dorothy Bland, Director, Division of Journalism, Dr. Bettye Grable, Associate Professor, Division of Journalism, **School of Nursing:** Dr. Doris Ballard-Ferguson, Professor, Dr. Janet Marshall, Professor; **Environmental Sciences Institute:** Dr. Jennifer Cherrier, Associate Professor, Dr. Richard Gragg, Associate Director/Associate; **Library-Management:** Brenda Wright, Assistant Director, **Office of Academic Affairs:** Dr. Fay Vaughn-Cooke, Associate Provost (*became ill*), Dr. William Hudson, Director of Retention (*Replacement*), Dr. Donald Palm, Assistant Vice President; **Office of Institutional Effectiveness:** Dr. Gita Pitter, Associate Vice President.

**METHODOLOGY**

Initially, meetings were held with the full task force, however, the size of the task force dictated that smaller groups working together would be more effective.

The task force was divided into 3 sub-committees: Groups I, II & III. Where possible each group had at least one member from each college or school. The task force chair selected a chair for each group. Group I was chaired by Dr. Verian Thomas, Professor and Director of Agricultural Sciences; Group II was chaired by Professor Dorothy Bland, Director of Journalism; and Group III was chaired initially by Dr. Chanta Haywood, Dean of Graduate Studies; but, because of an illness, she was replaced by Dr. William E. Hudson, Jr., Director of the Office of Retention and Graduation.

The group members are as follows:

**Group 1:** Chair- Verian Thomas, Dr. Genniver Bell, College of Education; Dr. Doris Ballard-Ferguson, School of Nursing, Dr. Bettye Grable, School of Journalism/Graphic Communication, Dr. Richard Gragg,
To facilitate open communication between task force members, within the groups and between groups and access to collected documents, an Organizational Analysis Task Force Blackboard site was established. Each member of the task force was provided full access to the site.

Data Collection

The primary data examined in the study of the academic structure was supplied by the Office of Institutional Effectiveness, Office of the Provost, Office of the Human Resources, and the Office of the President. These data items included Student Enrollments and Degrees Awarded by College and Schools, Productivity Analysis, including Sponsored Research, College and School Organization Charts, 2007 Presidential Transition Colleges and Schools SWOT Analysis; FAMU Major and Degree Inventory, the University’s Organizational Charts and FAMU Strategic Plan; 2004-2005, 2012-2013 and 2010 - 2020. Each of the data items was posted on Blackboard for task force members to review. In addition to those documents, a historic timeline of the FAMU Academic Structure was developed by the School of Architecture’s library staff. This timeline extended from 1887 when there was one academic division to the current structure of 13 Colleges and Schools and one Institute.

Each member of the task force was encouraged to meet with their respective Dean and/or Director and faculty to keep them apprised of the process as well as solicit trends and recommendations for consideration.

Each group met throughout the spring and summer semesters separately to review the data provided, as well as samples from other institutions, and to devise a strategy for considering the existing organizational structure. Each was charged with proposing independently a set of recommendations.
The Task Force Chair met with each group initially then met with the Group Chairs periodically to review the respective progress of each group and to provide additional requested information.

On August 4, 2009, the full task force met in the School of Architecture building to present a draft of the recommendations of the three groups. This meeting was the basis for a subsequent presentation at the Faculty Planning Conference, August 12-14, 2009.

2009 Faculty Planning Conference

The session at the Faculty Planning Conference was entitled “Academic Organizational Structure for a 2020 Vision”. It was described as follows:

“The Provost has charged the 36 members of the Organizational Analysis Task Force with the review of the University’s existing academic, organizational structure for effectiveness and efficiency. In particular, the Task Force was asked to determine the appropriateness of the existing academic programs and program groupings to train our students in emerging areas of critical thinking and new technologies in order to make them “society-ready” graduates, who will be competitive in the global economy.”

This session was held in the Grand Ballroom on the afternoon of August 13, 2009, and it was well attended by members of the faculty. The format of the session was organized so that after the formal presentations, the participants could break up into smaller discussion groups with task force members. The faculty in attendance was encouraged to fill out a brief questionnaire. It asked them to write down any questions that they may have about the presentations and solicited recommendations from them along with the rationale and reasons? We collected approximately 80-90 responses. The comments were transcribed as draft notes and placed on Blackboard for the task force members to review.

Organization Analysis Task Force Workshop

The Task Force met on Friday, February 26, 2010 from 11:30 a.m. to 5:00 p.m. in Room 451 of the Lawson Teaching Gym. The workshop was facilitated by Attorney Rosalind Fuse-Hall, Chief of Staff. The task force accomplished its objective, which was to combine the recommendations from the three subcommittees to organize the academic structure into a more synergistic and efficient structure.

There were several areas that were reflected in each of the three sets of recommendations even though the groups functioned independently. The first was that the School of Graduate Studies and the School of General Studies were both service units and not academic units. The School of Graduate Studies would be more effective under the Office of Research providing a seamless interface between funded grants and graduate support.

The Task Force also agreed that many of the service functions of the School of General Studies were duplicated in other parts of the University and that the reorganization would provide the opportunity to
eliminate the School of General Studies and link its functions to the Office of University Retention in conjunction with the academic units of the university. Further, it was also commonly proposed by the three sub-groups that issues and activities related to academic advisement, retention and progression of our students in lower divisions could also be addressed by creating a similar entity for upper divisions which would form the basis for an Honors College.

The Task Force agreed to cluster the college and schools in the health sciences into a Center for Health Sciences, divide the disciplines in the College of Arts and Science into three distinct entities: one for Science and Technology, one for Art and Humanities and another for Behavior and Social Sciences. In addition, the College of Engineering Sciences, Technology & Agriculture would be changed to College of Agricultural Sciences and Environmental Sciences. Such changes, which are preliminary in nature, are intended to reflect synergy between the academic programs particularly in relationship to shared teaching responsibilities, collaborative research opportunities, and reduced expenditures based on the minimizing duplicated effort and offerings.

**Presentation to the Provost and to the University Community**

The Chair of the Task Force met with and presented the summary of the process and actions of the task force to the Provost. As a result of having received the preliminary summary the Office of the Provost is now engaged in developing plans to share the summary and the subsequent final report with the university community. The process of sharing is critical for the goal of achieving input and feedback from stakeholders throughout the campus. Although the membership on the original task force reflected a cross section of the university and over the course of its existence, the task force provided opportunities for input from a variety of groups and individuals, it is at this stage that wide-scale review and response is essential. It must also be noted that although the original charge of the task force focused on assessing the best organizational structure for the delivery of the FAMU academic programs, over the several years in which the task force was in operation, the fiscal challenges faced by the university increased due to a series of devastating budget cuts. The response of the university to the recommendations of the task force must now, more than ever, reflect the current economic climate, the anticipated continuation of that climate for the next several years and, the repositioning of the university as the economy strengthens in the future. During the period of time that the Reorganization Task force was engaged in its analyses, the university adopted a Strategic Plan “2010-2020 Vision with Courage.” The goals and guiding principles of the Strategic Plan must also be considered as the reorganization of the academic units is proposed.

As we move into the next phase of activity related to the results of the Reorganization Task Force, the following next steps have been identified:

- Present final Report to the Provost in response to the original charge
- Disseminate the final Report of the task force to the university community
- Charge members of the task force as well as other key members of the university community to engage in, lead, and facilitate discussions of the recommendations contained in the report with
a broad representation of the community including but not limited to: faculty, Faculty Senate, students, staff and alumni.

- Develop approaches and strategies to capture and compile the responses and feedback emanating from the Report
- Analyze the responses and feedback by: select members of the task force (including the Chair and the three sub-committee chairs); select members of the Office of Academic Affairs (including the Provost, the VP for Institutional Effectiveness, the AVP for Academic Affairs); select members of the President’s Leadership Team (including the CFO, the Chief Communications Officer and the Chief of Staff); and others that may be identified as critical to the task.
- Present the final recommendation to the Provost and President who will be responsible for any modifications they deem necessary followed by it being finalized and disseminated

It is expected that the following timeline will be followed:

**December 2010**       Presentation of the methodology to the Board of Trustees  
**January 2011**        Final Report to the Provost  
**January 2011**        Dissemination and discussion of Report within the university community  
**February 2011**       Analysis of results of dissemination and discussion  
**March 2011**          Reorganization finalized and announced