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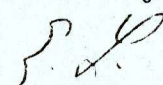


Edwardsville Bulletin

To the Faculty and Staff of Southern Illinois University at Edwardsville

Vol. 12, No. 15
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MEMO TO: The University Community

FROM: Earl Lazerson 

SUBJECT: Annual Report of the Planning and Budget Council

The Report of the University Planning and Budget Council for 1979/80 has been received by the President's Office. The first year of operation for the Council has been an extremely active and productive period. To provide the SIUE community with comprehensive information about the activities of the Council the complete text of the Report is reproduced below.

In addition, a summary of the report of the Council's Budget Review Committee will be disseminated via a Bulletin shortly. The Budget Review Committee's work and recommendations bears directly on critical issues now facing the University. A thorough understanding of the information presented in their report will be helpful in resolving many of these issues.

I want to take this opportunity to express my appreciation and thanks to Dr. Glossop for his efforts as Chairperson of the Council, and to each member of the Council and its committees for their contributions to the Council and the University.

Report of the University Planning and Budget Council
to the University Community for 1979-80
Ronald J. Glossop, Chair

Much of the work of the Planning & Budget Council is carried on through its committees. Consequently this report will begin with work accomplished by the four Standing Committees of the Council. That will be followed by a review of the reports of three ad hoc committees and then a summary of other Council actions.

STANDING COMMITTEES

The Program Expansion and Retrenchment Committee was chaired by Donald Thompson. This committee worked closely with Jane Altes in evaluating proposed new and expanded programs which involved the allocation of new funds. A large proportion of its activity took place during the Winter Quarter when meetings and hearings on the various proposals were held. The final product of the Committee was a priority ranking of the seventeen proposed new and expanded programs which was forwarded through the Council to the President. The ranking beginning with the highest recommendation and proceeding to the lowest was as follows:

1. Doctor of Dental Medicine Program of the School of Dental Medicine.
2. Southern Illinois Census Data Program of the Center for Urban & Environmental Research and Services.
3. Expansion of Baccalaureate Program Edwardsville and Carbondale of the School of Nursing.
- 4-5. (tie). B.S. - Major in Construction of the Department of Engineering and Technology.
- 4-5. (tie). M.S. in Engineering with Majors in Civil and Electrical Engineering of the Department of Engineering and Technology.
6. Academic Resources: Office of Continuing Education of the Office of Continuing Education.
7. Professional Experience Program of the School of Business.
8. Certificate Program in Oral and Maxillofacial Surgery of the School of Dental Medicine.
9. Specialty Certificate in Endodontics of the School of Dental Medicine.
10. Career and Professional Development Programs of the Office of Continuing Education.
11. B.S. in Engineering of the Department of Engineering and Technology.
12. Resident Centers - Alton Center of the Office of Continuing Education.
13. Continuing Education and Support Services for Women of the Office of Continuing Education.
14. Counseling, Tutoring, and Skills of the Academic Resource Center.
15. B.S. in Medical Records Administration of University Services to East St. Louis.
16. B.S. in Administration of Justice: Law Enforcement of University Services to East St. Louis.
17. B.S. - Human Ecology and Family Services (Home Economics of University Services to East St. Louis).

The Physical Facilities Committee was chaired by Robert Koepke. This Committee dealt with issues such as development of a new master plan use for the campus, modification of roads and parking to accommodate the new multi-purpose facility, location of bikeways on and near campus, location of a student theater building on campus, arrangements for fraternity and sorority housing, development of facilities for continuing education, modifications of plans for the new multi-purpose facility, naming of roads and other things on campus, location of campus environmental

education trails, location and character of new roads to be built near the campus, and the need for a new building for a research center. The final products of the committee were: (1) a new master plan for land use on the campus (Master Plan V); (2) a set of recommendations concerning changes in roads and parking facilities related to the new multi-purpose facility; and (3) a recommendation concerning bikeways on and near the campus.

Master Plan V calls for maintenance of the central area for academic facilities and reserves space within it for five new buildings (including the multi-purpose building) and one parking lot. The revised plan suggests that some professional schools, both undergraduate and graduate, be located within this central academic area. The area presently occupied by the Security Office is set aside for medium density student housing whose residents could readily use the facilities of the University Center. Areas adjacent to the present housing at Tower Lake are also reserved for additional housing. The area just northwest of the water tower is set aside for academic buildings because of the ready availability of utilities. A large area west of the new tennis courts is set aside for outdoor recreation. It is proposed that an area south of the outdoor recreation area and east of Bluff Road be set aside as a public park called Founder's Park. Land along the various roads on campus are designated "visual easement" areas and space is allowed for two additional lanes for main roads that are presently only two lanes wide. Other areas are designated "natural areas" where trees and other natural growth will be preserved. For example, the area northeast of the fan parking lots is designated a natural area while that directly east of these lots is reserved for future development without specifying any particular use.

The new multi-purpose facility will be located just southwest of the intersection of the service road to the library and Circle Drive. The Physical Facilities Committee developed plans for modifications in parking and roads in the vicinity of this building including relocating the north part of the library service road slightly to the east and building a new parking lot west of the Communications Building.

The Physical Facilities Committee's recommendation on bikeways in the vicinity of the campus calls for the State of Illinois to provide bikeways along the proposed South Bypass from Illinois 159 to Illinois 157, along Illinois 157 from Ginger Creek to Schwarz Avenue in Edwardsville, and along Schwarz Avenue in Edwardsville. It is proposed that bikeways be established on campus along East University Drive and then North University Drive from Illinois 157 to the Hairpin, from the present Madison County Bikeway through the fan parking lots to the Hairpin, along the Inter-urban Trace westward from the present Morris Bikeway to Bluff Road, and along Bluff Road southward from the Inter-urban Trace to the present Madison County Bikeway.

The Budget Review Committee was chaired by Tom King. This Committee was broken down into sub-committees to review the particular parts of the University budget under the direction of the various Vice-Presidents and that part related to the Office of the President. These various sub-committees made their specific recommendations concerning the part of the budget they reviewed. In addition the Budget Review Committee as a whole produced a set of recommendations plus a great deal of accompanying data which were forwarded through the Council to the President.

In its report the Budget Review Committee noted that the need for formalized analysis leading to formalized planning and evaluation is immediate and recommended that the following procedures be instituted:

1. Each fiscal unit should establish meaningful measures of its own productivity in the areas of teaching, research and/or service as applicable to the unit mission.
2. Each credit-producing unit should be thoroughly evaluated to determine the appropriate level of resources needed for that unit to carry out its mission in light of the institutional mission and the current environment in which SIUE must operate. Various measures can be used to evaluate each unit and compare units with each other, but such measures should not be used as a basis for a mechanical approach to resource allocation which precludes judgments based on relevant differences in mission from one unit to another.
3. All activities not resulting in credit-hour production should be zero-based for purposes of budgeting and resource allocation and should be reviewed on this basis every five years.
4. A thorough review of all academic programs should be made in the very near future to justify each curricular offering in the spirit of zero-based budgeting, and this should also be done at least once every five years in the future.
5. Each proposed new and/or expanded program, fiscal unit, and administrative structure should be justified on the basis of cost-benefit considerations.
6. The annual budgeting process for credit-producing units should focus on identifying the appropriate level and use of resources for each unit to best carry out its agreed upon mission.
7. Each vice-president and the president should present his administrative unit's comprehensive budget to the appropriate sub-committee of the Budget Review Committee for review and recommendations.
8. For informational purposes each credit-producing unit's share of the cost of noncredit-producing units (overhead) should be reflected in the annual budget allocation notification document provided to each credit-producing unit.
9. Explicit consideration must be given each year to the proportion of total fiscal year resources to be committed to the summer session and to the relationship between the resources committed and goals accomplished.
10. Beginning with this report, the President should distribute copies of each annual report of the Budget Review Committee to all administrative officers and constituency heads and should see that multiple copies are made available in the library.
11. The President and his staff, along with members of the Planning and Budget Council, should begin an immediate review of all recommendations and accompanying materials in this report to decide on future planning and implementation implications and to develop a comprehensive program for planning built on this beginning.
12. Implementation of the entire process described in points 1-11 above should begin immediately.

The report contains a vast amount of information about matters such as credit-hour production, number of majors, and ratios of SCH to FTE and to Civil Service FTE from 1973 to 1980. Much of this data was collected and organized by Warren Joseph, Chairperson of the sub-committee on the Budget of the Vice-President and Provost.

The Committee for Performance Appraisal of the President and Vice Presidents met only once during the year. Mike Stern originally agreed to chair this committee but had to resign. It was not possible to find another member of the Planning and Budget Council to chair this committee.

AD HOC COMMITTEES

The first ad hoc committee appointed had the responsibility of developing Operating Papers for this Council. Ron Glossop chaired the committee. The Papers as approved by the Council at its May 29 meeting call for a Council composed of 10 faculty representatives, 4 USAC representatives, and 4 student representatives. The Council reports directly to the President, but copies of recommendations are sent to the three constituency heads who then have thirty days to forward reactions to the President. The Chairperson of the Council is selected each June by a committee consisting of the three constituency heads. The selection must be approved by the President. The four standing committees must be chaired by members of the Planning and Budget Council.

The second ad hoc committee was charged with investigating arrangements for long-term leaves without pay for faculty and staff. Robert Campbell chaired this committee. The policy developed by this committee and subsequently approved by the Council indicates that tenured faculty members and professional staff may, when the absence of leave without pay is mutually beneficial to the University and the employee, take leaves of absence for one-year periods, renewable up to a maximum length of three years. Terms of such agreements shall be negotiated between the University administration and the employee. One value of such leaves is that employees may explore other types of work without losing tenure and retirement benefits while doing their exploring.

A third ad hoc committee was appointed to examine the summer session. Roberta Bosse chaired this committee. This committee's recommendations, subsequently approved by the Planning and Budget Council, are as follows:

1. A concerted effort involving advertising and visits to high schools should be made to attract students to SIUE's summer courses.
2. Summer offerings should include more nontraditional sorts of courses such as seminars and workshops including ones devised especially for particular clientele.
3. The market should be surveyed to determine what particular non-traditional courses should be offered.
4. The possibility of more night classes during the summer should be explored.

Discussion of this report in the Planning and Budget Council also raised the issues of the need for more attention to the proportion of University resources being devoted to the summer session and the desirability of planning summer programs two or three years in advance.

A fourth ad hoc committee was charged with reviewing the transportation problems of those who use the campus. James Rotter was appointed to chair this committee. This committee was not appointed until the beginning of May so it had not yet been able to report by the end of the academic year.

OTHER COUNCIL BUSINESS

At many of its meetings the Council listened to presentations by administrators and others concerning particular issues and problems related to University Planning. The purpose of these sessions was not only to educate the Council members but also to provide feedback to those making the presentations. The reports made to the Council were as follows:

- October 4 - John Reiner on the IBHE's Normative Cost Study (unit-cost study).
- November 1 - Ria Frijters on parking and traffic.
- December 6 - Jane Altes on long-range planning.
- January 3 - Earl Beard on planning in the Office of the VP & P.
- January 31 - Steve Hannah on transportation.
- February 7 - Earl Lazerson on future University budgets.
- February 28 - Earl Lazerson on models for budget allocations.
- March 6 - Jim Buck on housing.
- April 24 - Earl Lazerson on the future of the University.

At its October 4 meeting the Council revised old policy statements related to planning to bring them into line with the new governance structure. At its November 1 meeting the Council discussed a proposal for a contingency plan to be put into effect prior to any declaration of fiscal exigency but no action was taken. At the December 6 meeting the Council agreed that the present guidelines on procedures to be followed in the event that cuts in programs or salary lines become necessary should be reconsidered, but the press of other Council business prevented such reconsideration at that time and later. This item should be given attention by the 1980-81 Council.

At its January 3 meeting the Council passed a resolution indicating its willingness and readiness to explore with the administration methods of resource allocation other than across-the-board percentage adjustments. At its January 31 meeting the Council discussed the University's policy on closing due to severe weather, and the consensus was that having the Vice-President for Business Affairs make the decision on this matter was a satisfactory way of handling the problem. At its March 6 meeting the Council voted to ask the Faculty Senate to reconsider a resolution it had passed asking the IBHE to look into the root causes of the high costs at SIUE. (The Faculty Senate did reconsider the matter and reversed its earlier decision). At its March 27 meeting the Council adopted a set of responses to seven questions President Lazerson had asked concerning future budgets for the University. These responses indicated that the

IBHE's Normative Cost Study should be used as a source of information for planning but should not be viewed as a standard to which we must conform in our internal allocation of funds, that the University's budget review process should include even those areas not covered by the IBHE's Normative Cost Study, that those areas of SIUE regarded as underfunded in the Normative Cost Study should not automatically receive additional support but that their requests be given a sympathetic ear, and that the President of the University should take a leadership role in bringing about the budget cuts required by the IBHE. At its April 3 meeting the Council endorsed the Faculty Senate's proposal that some released time be guaranteed for the faculty member who serves as program review coordinator, adding a suggestion that greater effort be made to combine undergraduate and graduate program reviews.

Other actions of the Council are included in the earlier sections of this report concerning the work of its committees.

The Chairperson of the Council wishes to express his appreciation to all those on the Council and its committees for their dedicated work. A special thanks goes to the chairpersons of the various committees, all of whom did an excellent job of keeping their committees functioning and of developing reports that should contribute significantly to the welfare of the University in the years to come.