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Called to order by Chair John Allison at 2:03 p.m., CH 120.

Present: J. Allison, C. Eberly, G. Foster, F. Fraker, R. Gholson, R. Jorstad, W. Kirk, J. Lambert, J. Lasky, G. Mason, J. McElligott, J. Ozier, L. Walker, W. Weber, D. Wolf

Visitors: Signing the attendance sheet or being publicly recognized by Chair Allison are the following: E. Midkiff, A. Sanders, C. Gallagher, G. Aylesworth, J. Kilgore, T. Shonk, D. Dudley, W. Chandler, M. Libbey, K. Grisso, F. Yaffe, A. Baharlou, J. Lynch, C. Majewski, F. McCormick, D. Carpenter, R. Bergmann, E. Keiter, S. Bingham-Porter, R.L. Hooser, H. Taylor, N. Spencer, A. Tate, J. Quivey, L. Bates, B. Whittenbarger, E. Karbassioon, T. Mason, B. Hill, B. Augustine, J. Smitley, M.A. Hanner, S. Ashmore, K. Furumo, M. Herrington-Perry, J. Lambert, J. Nilsen, J. Abell, P. Martinez, J. Anselman, R. Wandling, D. Flessor, C. Schmutde. Others were in attendance as well.

Minutes: A motion (Kirk/Wolf) to approve the Minutes of Sept. 6, 1994 as published passed unanimously.

I. STRATEGIC PLANNING FORUM

Tim Shonk, ENG, expressed general support of strategic planning, including aims of plans, but he "remains somewhat mystified about where this will lead us." He asked, "How will this define us as an academic community? Are we formulating a plan to have a plan? How much of this helps us with primary mission--to provide EIU students with the best education possible?"

In general, Shonk questioned the document language, such as using static verbs in writing objectives for teaching areas and dynamic ones for administrative areas. He also questioned incorporating business-related terms, metaphors, and so on. He noted that we are not a for-profit business, that what customers (the students) want vs. what students need may be two vastly different things, and that the business metaphor is simply not appropriate. Shonk further inquired as to how funds will be dispersed, and who will make decisions.

Eleanor Midkiff spoke for **Laurent Gosselin** whose address was on behalf of UPI but not at their direction. Gosselin started by outlining both union's and management's responsibilities. He noted that the strategic planning process, as it has been undertaken, is "not only redundant and wasteful but it is a direct affront to the collective bargaining process." He believes the strategic planning process has been designed "to usurp traditional powers," and "it

certainly is a waste of limited University resources and valuable faculty time."

Gosselin noted concerns about contractual matters that may be compromised, and recommended faculty/staff disengage themselves from this planning process and stay with current planning procedures. He concluded that we ought to "be wary of any administrative plan that weakens the hard-fought-for and hard-earned protection that have been gained through the collective bargaining process and your hard work."

Gary Aylesworth, PHI, said he spoke for himself, not his department or Council of Chairs, and stated that he is not against longterm planning and paying bills. He addressed five problems. The first is the fallacy that the future is "plannable" to the extent demanded by the articulated plans. As an example, he points to administration's attempt to "anticipate all of our questions about the strategic plan--we have a controlled, one-sided presentation instead of an open and honest discussion." Such planning has not worked. The second problem is that strategic planning emphasizes the quantification of quality. He notes that in higher education, the measure of quality is "often a matter of judgment, discretion, and subtlety."

Citing a published study, Aylesworth noted as his third point the problem of goal displacement. He suggests that academic initiatives will be reduced to issues of budget-management. The fourth problem relates to centralization. He stated that the published study argues that protection and allocation of resources tend to become the primary concerns of administration, and our budgets will be tied to the strategic plan. A truly decentralized budget will allow us to handle these concerns at the lower levels. The fifth problem is that as more the details are known about the strategic plan, the less attractive the plan becomes. Departments have been asked to reserve three percent of their budget for safety and health concerns. According to Aylesworth, "decentralization of budget is looking more like the decentralization of budget-deficits and financial liabilities."

Sandy Bingham-Porter from Staff Senate said that the staff was excited about being included in the strategic planning process. She noted that collectively, the staff at Eastern has contributed an average of 9 1/2 years of service to the university and, therefore, have great knowledge of the university and how things operate. Her concern is that strategic planning is supposed to include everyone, but at least 50 % of the staff are not being included. Some feel that management would not listen to them or would do what they want, regardless of staff input. Staff need to be part of the planning process.

David Radavich, ENG, could not attend the forum, so Bill Weber, ECN, read a statement from him. Radavich agreed with over-arching goals of strategic planning. However, he questioned whether these goals will be pursued and whether they will be diligently carried out. Radavich cites as one example Article II of the strategic plan which commits the university to maintain a

"highly qualified staff", and states the objective "to secure competitive salaries and benefits." In spite of the stated goal and objective, the administration proposed a "ludicrous" 0.84 percent increase in faculty salaries, and is already in noncompliance with strategic planning.

Radavich specifically asks: "(1) Why is it that Eastern's faculty are urged to support a Strategic Plan whose spirit and letter the administration has already sought to violate? (2) ...What are the REAL, perhaps hidden objectives of the plan? and (3)...by what means will it (the administration) be held accountable for the actions which seem to violate the spirit and the letter of the plan?" He also indicates that we need some mechanism of assessment to insure that all segments of the university pursue the goals in the governing document.

Chair Allison received a variety of E-Mail concerning strategic planning and shared these messages with the audience. **Steven Payne**, MAN/MAR, indicated there were strengths and weaknesses to the plan but the process seemed to be essentially top-down. He doesn't believe departmental or unit knowledge has been accessed. The plan is proceeding without needed creative inputs. He wrote that, "the departmental or unit inputs expected by the administration, given the proposed process, will largely have self-defensive rather than strategic, or integrative characteristics."

Wayne Chandler, MAN/MAR, who has taught strategic planning for numerous years, expressed skepticism about the current model used for planning. He noted that "control elements, i.e. performance indicators result from the plan and are designed to see that the plan is realized." He also indicated that "we seem to be developing performance indicators and having done so, develop strategic plans that will respond to the performance indicators." He suggested we not "put the cart before the horse," and to "Tell me the rules of the game, and if I want to play, at least I will know the rules." In addition, he wondered why the administration has not relied on experts on strategic planning--people readily available at EIU.

Chair Allison reported that many other pieces of E-mail generally addressed the costs and benefits of strategic planning, and then provided those in attendance with the opportunity to speak.

Herman Taylor, MUS, brought up the question of implementation, and asked, while noting that his department didn't have money, "How will goals that cost money be achieved?"

Senator Ozier asked Dr. Taylor to clarify the answer to a question he asked at a previous meeting where both were in attendance. Taylor had asked the administration, that if he did not replace a faculty member, could the money saved be transferred to other line items?

Taylor responded to Senator Ozier by indicating he had heard "yes," it would

be possible, although not until the next fiscal year. Taylor noted that decentralization takes a pause at the Dean's level. Money is turned in to the Dean.

John Kilgore, ENG, noted that the strategic plan shared the vagueness of many plans. We affirm and affirm, but it is difficult to "see through the haze" and see what is really there. He wondered what would give when things (goals) come in conflict. "It's hard to object to strategic planning," but what will come out of it is hard to foresee.

Fred Yaffe, PSY, expressed his concern with time frame, that we're rushing the planning through at the department level. We need longer time at faculty/peer level. He also expressed concern related to performance indicators and the fact that the data he's getting is bad data, "which is worse than no data at all." Data to support the performance indicators came from the university data book, and he noted that data had been transferred and recorded incorrectly. His main concern was that we're being measured by data that are suspicious. Time at the "nuts and bolts" level needs to be longer.

Senator Eberly appreciated Yaffe's not being confident with data and data base, and stated that the university has an antiquated data base.

Jill Nilsen, Special Assistant to the President, noted that there are errors with data and said that they are working to take care of any problems. The data are for department/faculty use and benefit. Data can help us look at strengths and weaknesses. She indicated that efforts are being made to clean up the data, but for now, the data will stay at the department level.

Senator Mason reiterated some previous concerns about the process, outcomes, and degree of faculty involvement. She wondered how the information will be used ultimately.

Senator Fraker talked about two processes that are very different--planning, which is positive--and downsizing, which is problematic. He indicated that trust is an issue. The two activities (planning and downsizing) are colliding.

Senator Walker asked if strategic planning should be done at a not-for-profit institution such as EIU. Many complications result directly from being not for profit. "First, there will be conflicting goals and objectives." He noted that our input is difficult to measure, and asked, "To what extent are students involved in the process?" Second, we will probably shift emphasis from outputs to inputs, which will result in goal displacement, which is a dysfunctional effect.

Senator Walker's third point was that since value of output is difficult to measure, "operating objectives will be stated in very vague terms." This means that "more decisions will be based on political factors rather than

economic factors." Fourth, to the extent that there are strong "professional values and traditions in the organization," it will be difficult to change behavior. Our focus has been on what to do, rather than why to do it.

At this point, a motion (Fraker/Eberly) passed unanimously to allow Chair Allison, at his discretion, to invite members of the audience to pose questions of administrators and allow those asked time to answer.

Tim Mason, ECN, asked President Jorns to respond to some issues brought up earlier. **President Jorns** said he appreciated the fact that people came to the forum. He didn't think we should fear the process. Ultimately, it is intended to benefit all people at the university. He noted that we need sense of direction, and need to know how to determine that, adding it will take at least another two years to get the bugs out. He acknowledged the data problems, but claimed that the data will give us a sense of where we are. The data are not intended to be used against us.

Carol Schumde, ENG, a scheduled speaker, then addressed the audience about a concern she had when she discovered that the General Education Assessment Committee was asked to draw up an articulated plan for the General Education program. This alarms her because it is fraught with overlapping. Goals and objectives would be dealt with at a department level in relation to General Education concerns, and then people outside the department have been asked to come up with strengths and weaknesses. President Jorns interrupted, saying that that was in error, and this was not going to be done. Senator Weber asked how such an error could happen, and Jorns replied that such errors happen when we have new people. **VP Hill** replied that at first the administration thought the General Education Committee could provide feedback, but found that it was not viable.

Michael Loudon, ENG, asked who was in charge of General Education. VPAA Hill said her office is responsible for making sure there are enough seats and chairs, departments are responsible for having classes, and CAA determines the program. The Academic Affairs office assures implementation of the program. Loudon asked who is responsible for General Education strategic planning. She noted that it's done first at the departmental level, then it goes to the Dean, then VPAA. CAA would not be involved in it.

Carol Schumde, ENG, stated that the strategic plan drives funding. She asked, "if CAA has an objective that conflicts with strategic plan, what would happen in terms of funding? Would strategic plan take priority and CAA would be told "no", not to do this?"

President Jorns replied that this would not happen because the Strategic Plan reflects the campus (and CAA) sentiment.

Devon Flessor, ENG, spoke as a temporary instructor, and noted that

temporaries are not represented in this process. She wants temporaries to be asked for their input, and to be part of the process. She wants them to be consulted.

Herman Taylor, MUS expressed that he was pleased to hear that the plan will not be punitive, but wondered how all units can be held accountable.

Jorns reiterated that this planning is not punitive. He noted that there is a possibility of getting more revenue for the university. He said, "The real question is what do we think we ought to be doing?" He doesn't think we'll be cutting any degree programs for the time being, and said that some administration has been cut, but "we're going to cut more." However, we should be able to get money for things that lead to quality programs.

Chair Allison expressed his belief that the number of administrators in Old Main was proliferating. President Jorns said it is quite the contrary. If there is a new position, "we'll do it by taking the 'top off' one big administrative position that was left unfilled. "

Chair Allison noted that he'd be interested in seeing the difference in money saved from college consolidation and money being appropriated at higher levels. He asked, "Has any increase in personnel or expenses at highest levels consumed savings that might have been made at college level?" President Jorns replied, "No." Dr. Jorns agreed to provide an accounting to the Senate through Kim Furumo.

Senator Jorstad asked, "Since resource allocation is coming, when would we be looking at departmental consolidation?" President Jorns said he didn't see a need to eliminate academic programs, but noted that chairs cost a lot. He doesn't see consolidation happening for two to five years.

Senator Weber said he has "a bad taste from PQP. We saw from that process how bad data can be misused." He maintained that "with strategic planning, we are generating lots of data, and the data could be examined differently by different people. What reassurance can the administration give us that the data won't be misused as with PQP?"

President Jorns said his assurance is that he is "inalterably committed to the collegial process." Short of saving money for emergencies, anything departments want to do, must be reflected in the plan. The dean signs off on the plan. The dean will be accountable, also.

Chair Allison noted that he had many e-mail messages asking about the cost of strategic planning so far. Jorns said that the cost to date \$1687. People who were here before strategic planning are doing what they did plus more. Carpenter asked about the general cost of strategic planning, personnel costs, and the Special Assistant position. Jorns responded that these are not new

positions, and that if these people were not working on this project, they would be working on some different project. Senator Walker noted that faculty spends time with this, and mentioned opportunity costs.

Senator Mason argued that if the business metaphor were to be extended, all personnel hours ought to be considered in the cost of the project. President Jorns indicated that such data could be compiled, if desired.

Dino Martinez, Housing, said there are two issues--personnel time and cost for actual planning. He applauded the effort of strategic planning. He said timing may be short, but any plan or idea may create defensiveness, and noted that there is a certain risk involved in any planning effort.

President Jorns reported that we have 1700 people who work at EIU and the faculty are the reason the university is here. We have lots of supervision in this university, and he feels that we can do with fewer supervisors.

Senator Eberly noted that one of our objectives is to raise standardized testing scores by three points. He said it will require a completely different environment to create this change.

David Carpenter, ENG, asked President Jorns two questions: 1. Did President Jorns state that faculty are the reason we're here? and 2. Is it legal to use state appropriated funds to hire a lobbyist? Jorns replied that we are here for faculty to teach students. He also said appropriated funds can be used to hire a "lobbyist", and explained how.

A motion to adjourn (Walker/Eberly) passed unanimously. The meeting adjourned at 4:10. The next meeting is Sept. 20, 2:00 p.m., BOG Room - Booth Library.

TENTATIVE AGENDA ITEMS:

Review of Strategic Planning forum
Response to UPI concerning grievance

SUMMARY OF THEMES EMERGING FROM THE FORUM:

The following is an outline of issues addressed at the forum as perceived by the Faculty Senate Recorder. This list is not exhaustive and will be reformulated at the next Senate meeting.

1. Greater effort needs to be made to include all individuals in the planning process.
 - A. The current time frame may be too tight.
 - B. Problems exist with available data and may be misleading.
2. Sentiment expressed noted cost (personnel and faculty time) involved with the process may be high.
3. Many question the outcome of strategic planning.
 - A. We need to make certain the plan is tied to our mission.
 - B. The issue of accountability needs to be addressed at all levels.
 1. Funding needs to be connected to objectives.
 2. Uncertainty exists regarding how objectives that need new funding will be addressed.
 - C. The current planning process may be undermining collective bargaining.
 - D. The process seems to be budget-driven and may still result in centralization.
 - E. There is still ambiguity regarding implementation.
4. Concern continues regarding measuring activities quantitatively rather than qualitatively (many goals we achieve are not quantifiable).

Respectfully submitted,

Gail Mason, Recorder