

**BOARD OF REGENTS, STATE OF IOWA
PHASE II AND III ORGANIZATIONAL REVIEW PROJECTS**

**G.D. 7
Exhibit A**

SUMMARY

Organizational Review Project	Brief Description of Project	Who Was Responsible for Project (Board Office, Institution, MGT)?	Recommended Actions	Action by Board of Regents
Phase II Recommendations				
II-1 Reduce Number of Regent Meetings	The Board of Regents should review their current meeting schedule and agenda arrangements to determine if travel costs can be reduced and staff productivity increased while still enabling the Regents to fully execute their responsibilities.	Barak/Board Office	Reduce the number of Board meetings . Reduce the number of 2-day meetings when possible. Improve meeting planning to reduce staff & institutional travel costs.	Approved 7/18/02
II-2 Review BOR Approval Thresholds	A Board of Regents committee should review the current purchasing, contracting, and personnel appointment approval thresholds with the objective of delegating more decision-making authority to the institutions.	Hendrickson & Racki /Board Office	Adopt the threshold changes as summarized and outlined in Exhibit B.	
II-3 Streamline Instructional Program Delivery - Part 1	The Board of Regents should prioritize and undertake a review of the instructional, research, and public service delivery systems at each university with the objective of streamlining the delivery systems and reallocating academic resources. (Course duplication; course sizes & scheduling; articulation of community college students; total credit hours to graduate; summer enrollments; enrollment management; remedial courses.)	Moak/MGT	<p>The Regent universities, in consultation with the Board Office, should conduct a detailed examination in the areas/courses that have been identified as potentially duplicative by MGT – mathematics, history, statistics, engineering, English, writing, economics, and information systems and management. Analysis should include comparisons of enrollments, time of day that each course is offered, and course syllabi. The goal of the examination is to identify courses for elimination. This should be completed by May 2003.</p> <p>The Regent universities should determine whether alternative strategies to reduce undergraduate class sizes can be achieved in light of current economic conditions.</p> <p>Each university is encouraged to schedule more classes during non-traditional and non-popular hours (i.e., weekends, Fridays, evenings, and early mornings) to make more efficient use of classroom resources. In particular, the University of Iowa should re-assess its classroom assignment policies to make more efficient use of available class facilities.</p> <p>The University of Northern Iowa should evaluate its general education requirements.</p> <p>The Regent Committee on Educational Relations (RCER) should examine four-year graduation rate data and advising strategies, presenting recommendations to the Board by May 2003.</p>	

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			<p>The following should be considered by each of the Regent universities:</p> <ul style="list-style-type: none"> • Make greater use of summer school as an integral component of their enrollment management plans. • Offer classes during the summer, and in "inter-sessions" that might include all courses that are part of the general education graduation requirements. • Offer discipline-specific courses required for graduation during summer school and inter-sessions. • Evaluate alternative methods of distributing summer school revenues so that colleges/departments have incentives to offer courses and programs that are consistent with each university's strategic plan and goals. <p>Each university should develop integrated enrollment management and marketing plans that tie specifically to goals in their strategic plans and which are consistent with the Board of Regents Strategic Plan.</p>	
<p>II-3 Streamline Instructional Program Delivery - Part 2</p>	<p>The Board of Regents should prioritize and undertake a review of the instructional, research, and public service delivery systems at each university with the objective of streamlining the delivery systems and reallocating academic resources.</p> <p>(Academic organizational structure and administrative costs; faculty productivity, including extra-curricular assignments; small enrollment programs; low priority programs not essential to the core mission; outsourcing opportunities.)</p>	<p>Whitmore/SUI Richmond-Chidister/ISU Podolefsky/UNI</p>	<p>The Regent universities, working with staff in the Board Office, should review the list of potentially duplicative courses identified in Phase II. Analysis should include comparisons of enrollments, time of day that each course is offered, and course syllabi. Recommendations should be made by May 2003.</p>	
<p>II-4 Review Revenue Enhancement Opportunities</p>	<p>The Board of Regents should prioritize and conduct a review of revenue enhancement opportunities and establish a revenue growth schedule for each university.</p>	<p>Johnson/SUI Pickett/ISU Romano/UNI</p>		

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II-5 Conduct Review of Regent Employee Health Insurance	The Board of Regents should conduct an evaluation of its health benefit plans for faculty and professional and scientific employees to learn of actions taken to manage costs and to determine appropriate action to control future cost increases.	Brunson/Board Office		Approved 7/18/02
II-6 Review Purchasing Policies and Practices	The Board of Regents, working with institutional officials, should conduct a review of the purchasing policies and practices with the objective of reducing both the operational costs of purchasing activities and the prices paid for goods and services.	Hendrickson/Board Office	<p>Changes to the purchasing section of the <u>Regent Policy Manual</u> were previously completed by Board action on July 18, 2002.</p> <p>Encourage the Regent institutions to continue to look for opportunities to reduce costs and increase cooperative efforts including Regent-wide purchasing contracts such as those identified above.</p> <p>Request that reports on progress in achieving increased cooperative efforts be included in the annual governance report on Purchasing.</p>	
II-7 Improve Reallocation Process	The Board of Regents should review the processes and the results of the reallocation policy over the past five years.	Caruthers/MGT	<p>The Board reaffirm the need for a reallocation policy.</p> <p>Request that the Board Office, working with the institutions, develop a clear definition of types of reallocation expenditures and design a reporting system to demonstrate progress toward achieving the Board's goals.</p>	
II-8 Streamline ISD process for Individual Education Plan	The Iowa School for the Deaf should conduct a business process analysis of the individual education plans (IEP) process to identify opportunities for increased efficiency through the use of technology and changes to the process.	Johnson/ISD		Approved 7/18/02

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II-9 Review role and Composition of Advisory Boards	<p>The Board of Regents should review the role and composition of the special schools Advisory Boards and update as necessary.</p> <p>Consideration should be given to inclusion of representatives of parents, special school staff, students, K-12 educators, and the Department of Education.</p>	Kniker-Gonzalez/ Board Office	<p>Terminate existing Regent Advisory Committees at ISD & IBSSS (<i>Policy Manual, Sec. 107.G</i>)</p> <p>Direct the BO to continue to review all reports submitted by the special schools to the BOR. The BO shall be provided review drafts of these items prior to their submission for approval by the BOR.</p> <p>Allow the special schools to appoint advisory committees as needed to adequately meet the various needs of the school. It is suggested that one of these be a school improvement committee.</p> <p>Require the special schools to include in their strategic plans the major educational needs.</p> <p>Direct the BO and the special schools to evaluate these recommendations in two years (2004) to determine if they meet the intended objectives and to recommend appropriate changes.</p>	Approved 7/18/02
II-10 Seek Modifications to State Regulatory Statutes	The Board of Regents should, after further study, propose modifications to state statutes and other policies to achieve efficiencies through the following authorizations.	Caruthers/MGT	Accept the general recommendations by MGT for statutory and relevant policy changes described in Exhibit G and consider for possible adoption in legislative program.	
II-11 Conduct Further Review of Governance Reports	The Board of Regents should review its governance reporting requirements with the objective of streamlining the reporting requirements while maintaining an adequate accountability system.	Caruthers/MGT	<p>Approve a modified version of MGT's four-step review process for the Board of Regents governance reports noted in "Exhibit 5-1" in Exhibit H as the first step in periodically reviewing all the governance reports.</p> <p>Consider a MIS system.</p>	
II-12 Monitor Athletic Programs	The Board of Regents, working with university officials, should continue to monitor the athletic programs at each of the universities.	N/A	The PSG on Athletics will continue to monitor, per a review of recommendations from MGT at March PSG meeting.	Approved 7/18/02

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Phase III Recommendations				
III-1 Establish Facility Needs and Utilization Criteria	The Board of Regents should examine criteria and models for assessing the total facility space needs and the level of classroom and laboratory utilization and for guiding the design of new and renovated buildings. This objective system should then be used as a guideline to assess the facility needs and utilization of each campus.	Racki/Board Office	Do not proceed with this project at this time.	
III-2 Determine Deferred Maintenance Needs - Part 1	The Board of Regents should review the process used to determine deferred maintenance needs of the institutions and assess the full needs of the institutions in deferred maintenance funds.	Racki/Board Office	Do not proceed with this project at this time.	
III-2 Determine Deferred Maintenance Needs - Part 2	The Board of Regents should review the process used to determine deferred maintenance needs of the institutions and assess the full needs of the institutions in deferred maintenance funds.	Humble/MGT	Do not proceed with this project at this time.	
III-3 Re-engineer Administrative Processes at universities	Each university should prioritize and continue to undertake, when appropriate, re-engineering studies of institutional administrative and support services with the objective of reducing operating costs by eliminating unnecessary and duplicative work tasks, eliminating bottlenecks, and improving automated systems, where cost effective, and report actions taken to the Board of Regents.	Szeszycki-Beach/SUI Strah/ISU Dell/UNI	That the internal auditors on the university campuses assist with regularly scheduled reviews of administrative processes.	

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III-4 Review Enterprise Funds	Each of the Regent universities should conduct a critical review of both current enterprise funds and potential new enterprise funds. The evaluation of current funds should include: (1) a determination of whether to keep the fund, (2) a phased elimination of direct funding, (3) the introduction of competition from private businesses, and (4) a determination of whether savings could be achieved by outsourcing the operation.	Johnson/SUI Pickett/ISU Romano/UNI	Assign internal auditors to periodically review the functions on-campus and report to the Banking Committee on a routine basis.	
III-5 Review administrative procedures at IBSSS	The Iowa Braille and Sight Saving School should conduct an in-depth review of the administrative procedures and the roles and responsibilities of administrative and support staff to determine where effectiveness and efficiencies can be gained.	Gonzalez/Board Office	Accept the proposal to undertake an in-depth review of select administrative process at Iowa Braille and Sight Saving School.	