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Planning Committee

Wednesday, December 5, 2012

Prairie Lounge

Present: James Barbour, Charlie Cain, Julie Eckerle, Jane Kill, Margaret Kuchenreuther (chair), Sarah Mattson, Jordan Wentz

Absent: Michael Eble, Jim Hall, Arne Kildegaard, Leslie Meek, Lowell Rasmussen, James Rook

Guests: Erin Heath Lever and Peter Radcliffe both from the Office of Planning and Analysis, Twin Cities
Nancy Helsper, Jacquie Johnson and Colleen Miller

◆ Margaret began the meeting by handing out an overview highlighting what this committee has done over the last several months. (See attached at the end of these minutes.)

A) Last spring the Office of Planning and Analysis came to Morris and presented a model containing independent factors that helped this committee sort through all the schools with information in the IPEDs data center. This committee received a document (Model #1) that contained a long list of schools ranked based upon their distance from UMM according to Model #1 (that used seven unweighted factors). We studied this document and the institutions found therein, and many were not immediately recognizable to us. After researching some of the institutions, we felt many did not share our same mission. This committee decided to research other schools on our own. We used the Twin Cities' model and criteria, but wanted to find institutions that we felt fit us a little better. Nancy Helsper, Roger Wareham and Margaret conducted "thought experiments" using model, but imposing constraints and adding different factor weightings. The output has become what we call Model #3.

Model #3 uses model from the Twin Cities, but it has different weightings of the factors:

- ◆Weighted *highly*
 - Size
 - Liberal Arts
- ◆Weighted *less highly*
 - Access
 - Undergraduate competition
- ◆Weighted *to an even lesser degree*
 - Cost
 - Expenditure
- ◆Weighted at 0
 - Faculty Salaries

We are looking for 4-year institutions that appear like UMM.

At this point, other liberal arts institutions appeared on the list whose names were at least recognizable.

B) As the next step we looked at location of the institutions, whether they were private or public, enrollment, student-faculty ratio, how many full time faculty, degrees awarded, and tuition. In addition, one of the factors we feel important as part of the mission because of UMM's brand, and faculty expectations (as we part of the University of Minnesota system) is research. When researching a school via their website we looked to see if an expectation for research was immediately evident. We also looked at endowments. That is one way of gauging how many resources (plus tuition) are available at this institution. This might be important as we decide to list them as "peer" or "aspirational" institutions.

C) St. Mary's College of Maryland made the "Model 3" list. This institution is currently part of the Morris 14, and has always felt like UMM. However the other schools on this list are all privates.

Therefore, we needed to find a new model using other factors. (The Committee felt the majority of the schools should be public.) The TC's model was again used and constrained by Carnegie Class: Basic

(21—Bacc Colleges—Arts & Sciences). We also looked at the ccipug and added some graduate and professional program co-existence. (UMM has some pre-professional students.) This information generated Model #4, which contains 13 schools. We then added Carnegie Class 22 Bacc Colleges—Diverse Fields also the ccipug #12 which produced Model #5. This is the list we have been working from to date, plus the current Morris 14 and a selected list of CoPLAC schools that are not in the current Morris 14 (the CoPLAC list has expanded since the original Morris 14 list was conceived.)

Currently model #5 schools, Morris 14 and CoPLAC list are the schools under consideration. Not all institutions have been evaluated, as some of the persons who researched these schools were not able to make some of the meetings.

Criteria are as follows:

Mission is *PRIMARY*

◆Clear liberal arts focus,

Student body that looks like ours in terms of reasonably selective admissions policy and a socio-economically diverse population

Curriculum breadth—balanced curriculum (not heavily weighted in specific areas)

Strong research focus for both faculty and undergraduates -- news about faculty publications, symposia, students profiled for published research on institution web sites give clues about importance

◆Mostly secular in focus

Many of the private schools were originally founded with a religious affiliation, but are no longer as focused

◆Means—institutions with large endowments but that appear like us in other ways, we consider them as aspirational

◆Institutions that are in our region that we see as competitors

Current working list to date...

University of Maine at Farmington	Y/M	
University of Pittsburg-Greensburg		
University of Virginia's College at Wise	Y/M	
St Mary's College of Maryland		
New College of Florida	Y/M	<i>ASPIRATIONAL</i>
Purchase College SUNY	Y/M	
Gustavus Adolphus		<i>ASPIRATIONAL</i>
University of Mary Washington		
Fort Lewis College	Y/M	
University of North Carolina-Asheville		
Kalamazoo College		<i>ASPIRATIONAL</i>
DePauw University		<i>ASPIRATIONAL</i>
Concordia Moorhead		
Macalester		<i>ASPIRATIONAL</i>
Carleton		<i>ASPIRATIONAL</i>
St. Olaf		<i>ASPIRATIONAL</i>

However as this list is not very long, we may need to re-visit model #3 and once again look at private schools.

Notes behind the institution names

Y/M

Yes Maybe

Need to do more research to make a decision

Aspirational

Mostly privates (except New College of Florida...which is an institution all its own)

Hamline is not like us, too many graduate programs etc.

Discussion:

Charles Cain asked if we hadn't agreed St Olaf be both a yes and aspirational?

Margaret responded she would check on that. This process is a difficult one. UMM is a singular institution. It is not easy to find institutions that have the same personality as UMM. There are not very many schools like us. St Mary's College of Maryland is probably most like us.

Jacquie Johnson--Nancy Helsper met with the VCs. Nancy walked the group through the models and where the current process stands. It gets a person to think about the end product. What the uses of this list will be: salary comparisons being one of the reasons an aspirational institution is necessary on the list. In addition, Jacquie noted the schools in our region are some of our major competitors. The Regents are concerned about our graduation and retention rates. Therefore, private institutions with the big endowments, mostly upper-class, white students, higher salaries for faculty/staff etc. should be aspirational because their outcomes in graduation and retention are likely to exceed ours. It is important to have a good mix on the list. However, we need to keep everything in check, and neither category should be heavy.

Margaret explained at this point we aren't really sure how the models handle the student classification. Probably the factor entitled, "access" encompasses racial and socio-economic variables. However, we discovered that changing the weight of factors, doesn't typically change the institutions which appear on the list, but rather the rank order of the institutions.

The committee believes we need to find more "peers." And we need to intentionally look for these institutions. However before any list is finalized, the IPEDs data need to be checked to be make sure the things we think we are filtering for are actually there. Peter Radcliffe agreed to help in whatever way necessary/possible. They will partner with Nancy and help with the final process.

The committee still needs to look at a few schools, including Ramapo College, a few on the Morris 14 and a few other CoPLAC schools.

Margaret asked if the Twin Cities has any ideas about a different way to find a list containing more "peers"

*Peter Radcliffe--*The UMM committees' endeavors have been exactly what the Office of Planning and Analysis hoped. By using the tools offered, we found institutions that would not be thought of off the top of a person's head. This is the main reason for having "models." The job now is to research some of the institutions that appear like UMM. The current data from IPEDs just isn't available or refined enough to find institutions just like UMM. The original hope was to find institutions that appeared like UMM and dig deeper finding if the institutions are similar or not. And ways to find additional institutions is to investigate, maybe starting with the Morris 14 and CoPLAC schools. And then by rules of elimination you can say we researched these schools, but because of A,B,C, we put that institution aside. And again, before this list goes before anyone you can use the rationale as to why that institution did not remain on the list.

*Margaret--*Explained how the committee still needs to look at Ramapo, which is on the current Morris 14. Hamline, the Committee decided, has offers too many graduate degrees to be much like UMM; St John's and St Ben's have a focus that is probably too religious to be very like us.

*Julie Eckerle--*Explained that St John's and St Ben's rely heavily on each other. There is a lot of program sharing, what you can't get at one school you can get at the other. That is an entirely different structure than what Morris offers.

*Margaret--*Explained what she knew about Evergreen State. The course structure is totally unlike UMM. It has a branch campus, and it offers graduate courses. Also, you may take one class, for example the study of vegetation in the area, then taking an animation class make a video on how the vegetation grows, what it offers in its life cycle and go forward from there. But that one class takes all your energy and brain power and is interdisciplinary. This is great, but it is not UMM.

The rest of the institutions on the Morris 14 list remain to be researched.

Another issue even with the CoPLAC schools is size. Many schools are significantly larger and not as liberal arts focused as UMM, yet they define themselves as liberal arts

Erin Heath Lever--Perhaps having the strong emphasis on liberal arts plus the research factor may make UMM more distinct in terms of finding a comparable group. That influences teaching loads, tenure requirements and it influences many things about the average faculty person's life.

Margaret -- We also considered the CLA a couple weeks ago. It was decided it was absolutely not like us. Nonetheless, we did think about it, and discussed it.

Peter—Informed the group Nancy has been in contact with Daniel from the Office of Planning and Analysis. And from our office, he has probably done more work with this project. As we go forward, we all will certainly be there to help in whatever way possible.

Margaret--Asked Jacquie if there were any schools the VCs questioned that we have not thought of.

Jacquie—She worked with Nancy, running 10 models, and asking which schools keep appearing on each list? And those may be an important guide, places to research. She does not know if they will make the final list, but it is something to look at. Also, the geographic representation is important. The schools we compete with. She feels we are close, we can clearly articulate why each institution is on the list. But, when the list is in hand, what are the next steps (from both the committee and the Office of Planning and Analysis)?

Margaret--Looking at the list over half are aspirational. There must be a way to find more peer institutions.

Jacquie--How was aspirational defined? Mainly by the size of the endowment? If you look at Gustavus for example, their incoming ACT scores are just a little lower than ours. She is not sure of teaching loads but is sure they have a pretty large endowment as it is an old liberal arts institution. Is endowment one of the primary criteria?

Margaret--I believe that was one of the factors, endowments were usually pretty easy to find. However perusing their website you immediately got a feeling they were or were not like us. Sometimes they feel more "flush" than we are. If you take St Olaf for instance, their curriculum has a lot more interior specialization. Like instead of just English, they have the classics, European studies, Eurasian languages etc.

Julie--Unfortunately money always determines things. Take for instance Center College in Tennessee. In many ways they are a lot like us. However they have an incredible amount of money. And on their website they claim they can guarantee graduation in 4 years with study abroad and internships, and this is for everyone. So this is aspirational in terms of retention rates, etc. And why are they able to do that? It is because they have an extraordinary amount of money. Because of that it just doesn't translate to us, as much as I would like to see them on our list. We can't make those guarantees because we don't have that same kind of monies.

Jacquie--Selectivity is potentially another factor. Macalester and Carleton are highly selective. St Olaf falls somewhere between Gustavus and Macalester. Endowment can drive so many factors including diversity, faculty loads, and opportunities for students. New College is pretty selective also. However all in all we need to know how we are defining aspirational.

Margaret--We came to our criteria by looking at enough schools to know which were and were not like us. You can get a feel from the website information if the fit us or not.

Erin--You said there are 26 schools in CoPLAC? In listening to the conversation here today, it does appear as if there is no "perfect" peer group as UMM is so unique. I was curious about Northland College near Ashland Wisconsin. I know they emphasize sustainability, environmental studies, they have some pre-professional programs, etc. They are a smaller campus and they are also private. I realize the public/private is an issue. However if you look at St Olaf, yes they have a large endowment but do they have the socio-economic diversity that UMM is also looking for. Yet, if you have a smaller college that doesn't have the large endowment, then you end up with primarily an upper class rich white students. It sounds as if there needs to be a weighting discussion.

Margaret—Northland College has not appeared on any of our lists. We have just been going from the lists produced and as yet they have not turned up. They do have limited means especially compared to other privates.

ACT scores of admitted students is rarely found on the websites. It may be one of the items found on IPEDs.

Peter—Maybe Nancy and I can work on how to identify a “constellation” of institutions that might be worth more examination. That may produce a few more schools to examine.

Margaret—When we finish looking at a few CoPLAC schools and the few which were missed in initial discussions we are kind of at a standstill and where do we go from there? We clearly see a need to find more institutions that we can consider true peers. Or, at least, peer enough that we are willing to call them “peer.”

Nancy—We did look at some schools with graduation rates, or percentage of freshman with Pell grants. We looked at the 5 state region, and Minnesota only.

Margaret—If there are any other schools you could recommend, based on your thought experiments, we would be happy to look at them.

Nancy—I took the top 25 schools that appeared in all 10 models and produced another model. I think there are a few that appeared 6 times. They probably need to be looked at as possibilities for the list.

Jacquie—Internally, we need to finish the current work. And then come together with the list and bring it to the Steering Committee to ask that it go on to the Campus Assembly.

Margaret—I would like to take it to Faculty Affairs also. They are very interested in looking at the list.

Jacquie—Again we are looking to Peter for what he thinks the system expectations are so that we would then develop what we would consider to be a final list...here it is regardless of number of schools on the list, then what and where?

Peter—I am a bit hesitant because originally we were going to take the recommended list to Sr VP Jones and yet now we are trying to figure out where we are in the new scheme of things (since VP Jones has left the U of M). We haven't worked through very many decisions yet. I do think what we would want to do is take the proposal which has been fleshed out to the point where all has been discussed with UMM governance groups, and then figure out the right leadership committee at the system level, so they can look at it. I will try to poke around on it a little and then take it to maybe the President's Senior Leadership Group, it might be the place to at least brief them.

Jacquie—For some reasons the Academic Affairs committee seems like the right place...graduation retention rates, salaries, salary comparison, faculty/staff retention, tenure. This sounds right to me.

Margaret—FCC should see it too.

Peter—FCC also were promised this list would come to them.

Jacquie—One of my concerns has been what how is done here at UMM complies with the “rules.” Do we really know what the rules are? Is there an expectation of some combination of aspirational and peer groups...only peer groups...I don't want UMM to have one set of criteria, to define a list, then the Twin Cities move forward with something else, etc.

Peter—We have been trying to reach a more consistent kind of way to work on this...I think the division between peers and aspirational comparators and the ability to distinguish those two groups within is important.

Jacquie—I know you generated comparable lists, a beginning list for the other campuses, where are they with those lists?

Peter—Duluth has a new group they put together and they are using it for reporting now and I need to contact them to see if it is truly finalized. Then the Twin Cities and Crookston both have fairly mature groups that I feel could use another look, but there is not an immediate push on them. Rochester, we are trying to figure out to create something there, as they're not fully developed to what they will be. So from a pure data point, they don't even look like themselves, let alone anyone else.

Margaret--Do you know if the other institutions paid any attention to the Carnegie classification at all? Or is that only meaningful for us?

Peter—It is for some—not--That is one of the things over time we were finding some of the older comparison groups would wander as institutions changed, evolved and developed in different ways, many have changed from one Carnegie class to another that is one of the things. Then you start having all sorts of interesting issues like looking at *US News* which promotes the we care and we don't care what they say at the same time...and they became non-comparable in that kind of outlet as they were being categorized in a different group, so different things were measured and different comparisons made. I still think there is a value to that at least within a certain tolerance. There is some noise about how institutions are being classified there...

Margaret--That is why we have so many different numbers.

Peter--I think you have to reach out across some of those or it does get too narrow. It's a guide but not a perfect system either.

Margaret--Do you know why the other institutions have been able to move along so fast? Do they let staff do it?

Peter--I don't think anyone has moved along so fast. Most of these are historical developments. I can't recall off hand how long Crookston has had theirs. It has been awhile. The Twin Cities came out of the strategic position, a massive undertaking of 38 committees, so they didn't do anything quickly. Duluth I believe kept it at a leadership level, but I am sure they must have done some consulting. They didn't involve us much in the internal process so we didn't get much of a look there.

Margaret--Many schools are like Duluth, being a regional comprehensive institution makes it easier. Our problem is that there is no one who is really like us.

Peter--The Twin Cities modeling is almost irrelevant. There are so few large research universities, that when the modeling was played with, what is the result of that group—mostly what it currently has. You can throw the weights all over the place and there just aren't that many of them, so the same institutions keep turning up.

Nancy--If I am remembering right, at one point UMM was on Crookston's list, are we still on that list?

Peter--Yes, because they haven't updated their list. When the Twin Cities gets around to working with Crookston on a new comparison group, my thought is that Morris would probably NOT be on the Crookston list, but that is hard to say for sure at this point in time.

Erin--There was an article in *The Chronicle* about a year ago that contained a visual representation of different institutions and what peers they referred to. In most cases it seemed fairly consistent but every now and then you would have this strange one. There was one obscure like southeast Idaho Tech that goes up to Berkeley. And you say to yourself, how did that happen? Over all, I think it is just about being consistent. So given what you are doing at UMM I think you are certainly well underway over about 99% of the institutions.

Margaret--Do we have a hard deadline? We have been trying to have this committee meet only every other week. This makes it difficult to make much progress

Peter--In a perfect world I would have this set by the end of the academic year. As we go forward with the next round of accountability reports and whatever that is going to become, this is something we have and can work on assembling data to go with it. Ultimately I think from my perspective it is more important you

have a list/group you really believe in and want to use to make decisions and there is a strong rationale for why this is the group to me that is more important than deadline.

Jacquie--I agree, but in terms of the Regents' cycle and the Board's cycle this month the graduation and retention rates will be presented for all of the campuses. The September meeting traditionally is when the accountability report comes forward containing salary comparisons all of those kinds of things. Just backing this up however, if we are going to have a different set of peer/aspirant institutions comparison group for the accountability report, I guess I need to find out if there is some process we have to go through to in order to do that...that would be expected of us by the Provost, by Regents etc. I don't know the answer to that, so I will see what I can do. However backing up it would mean somewhere mid-semester (like Spring Break...added by Margaret) we could say here is the list.

Margaret--However that is tough, because that is only about 3 meetings as we don't begin again until mid-January and then only meet every other week.

Jacquie--It is easy for me to say, but it appears as if you are almost there.

Margaret--Yes we are getting there, however as I have stated a few times during this meeting I am concerned that we don't have enough peer institutions and quite a few aspirational peers.

Nancy--We want to run those examples too and that can take a little while. Then if we find something we don't like in those runs it will send us back to the drawing board.

Charlie--Perhaps we need to look back at the yes/maybes and take a look at the student profile in these institutions. To this point we have basically looked at how the institution compares to UMM, but maybe if we look at the average student, the ACT score etc. to determine if some of the yes/maybes might make a difference.

Margaret--Are they really yeses or are they nos?

Charlie--By doing this maybe we would be able to whittle down some of the aspirational?

Peter--We could run something fairly quickly on this group and give you a good snapshot of what is out there.

Margaret--Maybe we can think of 1 or 2 more that should go on the list, that we just haven't done yet, like the CoPLAC schools we haven't had time to look at, Ramapo, etc.

Julie--One thing I have noticed is going to schools and looking for research, looking at faculty pages one learns a lot. Then I went looking at UMM faculty pages, they just don't do it... and many students prospective and others, search faculty pages. The word needs to get out to our faculty and have them pay more attention to their pages. Some are in dire need of attention.

Jacquie--Market research doesn't show up. The need to update should come from the divisions etc., they need to pay attention to academic programs etc. These are looked more than the admissions website. Some of these pages are 10 years old. Let's all help raise awareness.

We are at the end of the meeting time. Thanks to Peter and Erin for coming today.

The Search for a UMM Comparison Group

The committee was concerned the initial list provided by the Office of Planning and Analysis found nearest neighbors that were not recognizable as being like us and contained few members of our current comparison group. The institution mission is considered paramount. Therefore, we have undertaken a process that tries to refine the group.

Initial Criteria:

1. Limit analysis to 4-year liberal arts institutions, which should be more like us than those on the previous list.
2. Factor Weights should not be equal, for example, no weight on salaries. Several “thought experiments” were run and the best result, producing a list of institutions that were recognizable as similar used the following weights: size (F1, w=3) and liberal arts focus (F5, w=3), followed by access (F3, w=1) and undergraduate composition (F6, w=1), then cost (F2, w=0.2) and expenditures (F7, w=0.2). The weights given each factor were arbitrary (**results labeled as Model 3**).
3. The majority of institutions should be public. Further “thought experiments” were conducted. The first constrained the list so only public institutions were included (public, 4 yr. or above). Then constrained by Carnegie Class:
 - Basic: 21 Bacc, Colleges -- Arts & Sciences (UMM’s class)
 - Undergraduate Instructional Program (ccipug):
 - Arts & Science focus, no graduate coexistence (UMM’s class)
 - Arts & Science focus, some graduate coexistence
 - Arts & Science plus professions, no graduate coexistence

This produced the very short **list labeled Model 4**

Therefore, the field was expanded by adding the following Carnegie Classes:

- Basic: 22 Bacc. Colleges – Diverse Fields
- Undergraduate Instructional Program (ccipug):
 - Professions plus arts & sciences, no graduate coexistence

This produced the **list labeled Model 5**

Members have been evaluating all of the institutions produced by Model 5, some of the institutions produced by Model 3, all of the current Morris 14, and some COPLAC institutions (those known to be primarily undergraduate liberal arts institutions).

As we thought about which institutions should be included, our criteria have included the following:

1. Mission, including:
 - a. clear liberal arts focus
 - b. a student population that looks like ours
 - selective admissions policy
 - a socioeconomically diverse student population
 - c. curriculum breadth
 - d. strong research focus for faculty and undergraduates
 - e. mostly secular focus
3. Means – institutions with large endowments considered aspirational

4. Institutions within our region that are potential competitors

The working list to date:

University of Maine at Farmington Y/M
University of Pittsburg-Greensburg
University of Virginia's College at Wise Y/M
St Mary's College of Maryland
New College of Florida Y/M ***ASPIRATIONAL***
Purchase College SUNY Y/M
Gustavus Adolphus ***ASPIRATIONAL***
University of Mary Washington
Fort Lewis College Y/M
University of North Carolina Asheville
Kalamazoo College ***ASPIRATIONAL***
DePauw University ***ASPIRATIONAL***
Concordia Moorhead
Macalester ***ASPIRATIONAL***
Carleton ***ASPIRATIONAL***
St. Olaf ***ASPIRATIONAL***