

9-1-2017

Substantive Change Prospectus Section 3. Assessment of Need- Final Narrative

Georgia Southern University

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Recommended Citation

Georgia Southern University, "Substantive Change Prospectus Section 3. Assessment of Need- Final Narrative" (2017). *SACSCOC Prospectus*. 4.
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3. **ASSESSMENT OF NEED AND PROGRAM PLANNING/APPROVAL**

Briefly discuss the rationale for the change, including an assessment of need; evidence of inclusion of the change in the institution's ongoing planning and evaluation processes; and documentation that faculty and other groups were involved in the review and approval of the change, where appropriate.

Rationale for Change – Assessment of Need for Institutional Consolidation in the USG

As with the previous seven institutional consolidations in the University System of Georgia (USG) completed as of 2017, as well as the proposed Georgia Southern University (GaSou) and Armstrong State University (Armstrong) consolidation, the confluence of four major developments led the University System of Georgia's then Chancellor, Hank Huckaby and its Board of Regents to conclude in fall 2011 that they needed to seriously consider consolidating multiple USG institutions.

Chief among these major developments was the deep economic impact of the national recession that started in 2008. The slow recovery from that recession continues to significantly restrict Georgia's economy and has resulted in a substantial loss of state funding for the USG and its institutions.

The second major development was the repeated call by Georgia's governor and Legislature for more cost-efficient operations within all state agencies, including the technical college system and the USG. Most recently, this call was made by the Senate Appropriations Committee, requesting that the Georgia Department of Audits conduct a study on Georgia's cost drivers in higher education. The Board of Regents (BOR) provided responses to the information presented in a December 2016 Special Examination Report, one of which reported institutional consolidations as an initiative to reduce costs (**Appendix 3.1**). Pressure to increase cost efficiencies was compounded by the state and federal governments' calls for slowing college tuition increases. Consequently, achieving cost efficiencies involved both adapting to restrictions and cuts in annual operating budgets and consolidating a number of public technical colleges and universities in Georgia. Encouraged by the successes of the first seven consolidations in the USG, the Board of Regents (BOR) and newly appointed Chancellor Steve Wrigley took action to pursue consolidation of GaSou and Armstrong.

A third development was the projected increase in public demand for higher education opportunities and services throughout the state, which the Regents are mission-bound to support. The reallocation and re-investment of anticipated administrative cost savings resulting from the GaSou/Armstrong consolidation into expanded GaSou educational programs and support allows the BOR to respond to public demand for more higher education services in GaSou's service area. These expanded programs and services might not have been funded otherwise.

The fourth development was the emergence in 2009 of the national Complete College America initiative, intended to improve post-secondary degree completion and educational attainment levels in the nation's workforce and meet projected employment demands in 2020. In 2011, Georgia launched its Complete College Georgia (CCG) initiative aligned with the Complete College America initiative. CCG calls for action plans to improve institutional rates of student retention, progression, and graduation. The comprehensiveness of a university is a key factor in ensuring CCG success. The GaSou/Armstrong consolidation provides the opportunity for the new university to capitalize on its expanded comprehensiveness to address the needs of

undergraduate students to produce higher retention, progression, and graduation rates.

In short, there were both public demands for expanded and increased higher education opportunities in Georgia and increasing constrictions in state funding to support those programs and services. Pressures to do more with less had become a common refrain. The chancellor and BOR concluded that business as usual in the USG was not a sustainable long-term solution and had to change if the BOR's vision, mission, and goals were to be realized. Institutional consolidation represented one strategic solution for meeting those challenges, especially since consolidation would lead to strengthening and expanding educational services in areas that might not otherwise be funded.

Assessed Potential for Consolidation

Opportunities/Challenges

In profiling the two institutions to be consolidated, the USG identifies on its website the following opportunities and challenges presented in the consolidation of GaSou and Armstrong (**Appendix 3.2**):

Opportunities

- Improve Armstrong State University graduation rates through leveraging Georgia Southern University's programs, services and other best practices
- Expand healthcare-related academic programs
- Create engineering academic programs
- Reinforce military partnerships vis-à-vis Liberty Center / Hinesville campus
- Reinvest savings from administrative efficiencies in programs to support student success
- Strengthen regional relationship to Georgia Southern and its wide array of academic and student life programs
- Expand regional presence and significantly enhance economic impact
- Maintain and enhance the role of Savannah State University through balancing program offerings and coordinating efforts between Savannah State and new Georgia Southern University

Challenges

- Blending of institutional missions and cultures
- Ensure continued strong community & alumni support
- About 60-minute drive between campuses

Evidence of the Consolidation's Inclusion in the Institution's Ongoing Planning and Evaluation Processes

The consolidation of GaSou and Armstrong is included in ongoing planning and evaluation processes at multiple levels, including the governing board, the University System Office, and the institution. As discussed previously in this section and in Section 2, the decision by the USG Board of Regents to consolidate GaSou and Armstrong links directly to the Strategic Plan and its strategic imperatives of the University System of Georgia. The Board's consolidation decisions were influenced by long-term and ongoing environmental scanning of past, current, and prospective economic and governmental conditions as well as state-level and national concerns about key issues such as degree completion rates, educational attainment levels of the

workforce, public demand for higher education opportunities, tuition costs, cutbacks in governmental expenditures, and increased governmental efficiency.

Institutional data on students, faculty, staff, academic programs, finances, and facilities are submitted on a regular ongoing basis by institutions to the System Office and were considered in the Board's consolidation decisions. The establishment of a Special Consolidation Committee of the Board to oversee and participate in the advancement of this new initiative and advise the Board in its related decision-making is additional evidence of BOR involvement in ongoing planning and evaluation processes.

Following the January 2017 vote by the Board of Regents to pursue consolidation of GaSou and Armstrong, the Chancellor immediately took action to incorporate consolidation preparations into the ongoing planning and evaluation processes of the USG System Office and its counterpart processes at the institutional level. Having learned lessons from the previous seven consolidations of 14 institutions, several decisions were made at the time of the initial action of the Board on the proposed GaSou and Armstrong consolidation to facilitate implementation efforts, including the identification of:

1. A president who will lead the consolidated institution (GaSou President Jaimie Hebert); and
2. The name of the consolidated institution (Georgia Southern University)

Chancellor Wrigley assigned John Fuchko, Vice Chancellor for Organization and Effectiveness, to lead GaSou/ASU consolidation efforts. The University System Office (USO) Consolidation Implementation Team was subsequently formed, composed of all lead functional area System administrators and other key individuals from the USO, led by Vice Chancellor Fuchko. The Consolidation Implementation Team meets weekly to review consolidation preparation progress and make plans for resolving consolidation issues that require System-level attention. This team is also responsible for creating the Consolidation Tracker spreadsheet, which contains 532 specific functional tasks that must be completed by GaSou and ASU to implement this consolidation in a comprehensive and effective manner.

Examples of key activities of the Consolidation Implementation Team include:

- Coordinating with the U.S. Department of Education for seamless transfer of financial aid accounts to the new consolidated institution in the period between the DOE's financial aid fiscal years based on the consolidation schedule;
- Arranging for September 1, 2017 completions of required financial audit reports for FY 2017
- Negotiating with BANNER, PeopleSoft, ADP vendors for assistance in consolidating institutional student, financial, personnel, and payroll databases on those systems; and
- Coordinating BOR and USO reviews and approvals of institutional mission changes, re-organization plans, institutional budget allocations, etc.

Following the consolidation announcement from the BOR, the presidents of GaSou and Armstrong established the Consolidation Implementation Committee (CIC), a 41 member team of administrators, faculty, staff, and students (20 from GaSou, 20 from Armstrong, and 1 from

Savannah State University), who are working together to provide coordination and collaborative leadership for constructing the new GaSou (**Appendix 3.3**). In an effort to help the CIC navigate the complex process of consolidation, 93 Operational Working Groups (OWGs) were established to address how the new university would handle consolidation of all of its programs, services, and support functions (**Appendix 3.4**). Each of the consolidation tasks identified by the System Office staff and others identified by GaSou and Armstrong were assigned to the appropriate OWG.

The CIC completed its work on the recommended new mission and administrative organization during the Spring and Summer of 2017. On April 18, 2017, the Board of Regents approved the new mission statement for the consolidated GaSou (**Appendix 3.5**). On April 11, 2017, the senior administrative structure for post-consolidation GaSou was released to the campus community and published on <http://consolidation.georgiasouthern.edu/> (**Appendices 3.6 and 3.7**).

As the record of published meeting agendas and notes posted on <http://consolidation.georgiasouthern.edu/cic-meetings/> reflects, the CIC has convened regularly to conduct its work in coordinating the OWGs and reviewing and refining their recommendations. Its work is expected to continue into 2018. When this prospectus is completed, most of the OWGs will have completed their consolidation tasks and recommended action plans, and those recommendations will have been reviewed and recommended by the CIC to the president for adoption. A running account of approved CIC recommendations is posted on the GaSou-Armstrong consolidation website (**Appendix 3.8**). Some OWGs, such as those involved in course-level curricular issues of consolidation, will continue their work into 2018 in preparation for early registration and the full implementation of the consolidated curriculum in fall semester 2018.

Evidence of Consolidation's Inclusion in the Institution's Ongoing Planning and Evaluation Processes

The consolidation of GaSou and ASU is included in ongoing planning and evaluation processes at multiple levels, including the governing board and the System Office. Institutional data on students, faculty, staff, academic programs, finances, and facilities are submitted on a regular, ongoing basis by institutions to the USG. As discussed previously in Section 2, the decision by the USG Board of Regents to consolidate GaSou and ASU links directly to the strategic imperatives of the University System of Georgia. The BOR's consolidation decisions were influenced by long-term and ongoing environmental scanning of past, current, and prospective economic and governmental conditions, as well as state-level and national concerns about key issues, such as degree completion rates, educational attainment levels of the workforce, public demand for higher education opportunities, tuition costs, cutbacks in governmental expenditures, and increased governmental efficiency.

Broad-based Involvement in Review and Approval of Consolidation Initiatives

The 41-member CIC is broad-based in its representation from each institution. The 93 Operational Working Groups with 90 sub-committees were co-chaired by GaSou and Armstrong faculty, staff, and administrators who were selected based on their areas of expertise relating to the focus of each OWG. These co-chairs then selected OWG members from both campuses who had expertise in the tasks assigned to each OWG. The membership, final report, and

recommendations of each OWG are published on the publicly accessible GaSou-Armstrong Consolidation website (<http://consolidation.georgiasouthern.edu>).

The 93 OWGs were organized with 90 sub-groups. Each was headed by a functional area coordinator. Some functional area coordinators coordinated more than one area.

The OWGs completed consolidation planning documents recommendations and submitted monthly status reports. The OWG co-chairs forwarded their plans and recommendations to the master tracker coordinator. Before sending the recommendations to the CIC for approval, the master tracker coordinator distributed recommendations for review and comment to leaders of functional areas, including but not limited to academic affairs, operations, legal affairs, and student success. This step assured consistency with the plans and recommendations of other OWGs and governing policies. Recommendations were then sent back from the first level reviewer to the Consolidation Manager with three options:

- Approved-forward to CIC;
- Not Approved-Need to rewrite and why;
- Not approved and reason

The recommendations that were approved by the first level reviewer were then distributed to the CIC for review, discussion, and decision. The broad-based System-level USO Consolidation Implementation chaired by the Vice Chancellor reviewed and commented on the recommendations being made to the CIC at the institution level. Some plans and recommendations required BOR approval and were forwarded to the BOR for approval. In cases where disagreement existed at the CIC level, it was intended that the new university's president, Jaimie Hebert, would make the final decision. As of the date of this report President Hebert has not been required to exercise this authority. All CIC approved recommendations are available at <http://consolidation.georgiasouthern.edu/approved-cic-recommendations/>.

This approach to organizing the hands-on work of the consolidation process resulted in broad participation from almost 500 individuals across the two universities. The consolidation committee structure allowed for processes, procedures, decisions, and recommendations to be discussed by individuals with the most knowledge and experience on the complex topics required for consolidation. In addition, in the interest of keeping all members of the campus community and others fully informed on the progress of consolidation planning and approvals, a public GaSou/Armstrong Consolidation website is maintained where all pertinent developments, updates, decisions, and materials are posted. The structure of the consolidation committees has facilitated a flow of communication up and down the levels of review and increased the dissemination of information among internal and external members of the collective campus community.

Finally, in adherence to the commitment both campuses have to shared governance, decisions such as curricular changes are going through the shared governance processes on each campus or within a special combined governance group as appropriate.

Appendices

- 3.1 BOR Special Examination Report
- 3.2 Opportunities and Challenges
- 3.3 CIC Membership
- 3.4 Operational Working Groups

- 3.5 Mission Statement Approval
- 3.6 Senior Leadership Structure
- 3.7 Senior Leadership Structure Website
- 3.8 Approved CIC Recommendations