Annual Retreat
Southern University Board of Supervisors
Thursday, August 25, 2011
Southern University Metro Center
610 Texas Street
Shreveport, Louisiana

8:00 a.m. BREAKFAST

8:45 a.m. RETREAT OPENING
Mr. Darren G. Mire, Board Chair
RETREAT OVERVIEW
Atty. Murphy F. Bell, Jr. – Facilitator
MOOD OF THE LOUISIANA LEGISLATURE
Mr. Patrick W. Bell

SESSION I
9:15 a.m. THE SOUTHERN STRATEGY – RETURN TO GLORY
SYSTEM President – Ronald Mason, Jr.
SUNO Chancellor – Victor Ukpolo
SUSLA Chancellor – Ray Belton
SULC Chancellor – Freddie Pitcher
SUAREC Chancellor – Leodrey Williams

SESSION II
11:00 a.m. RENAISSANCE SOUTHERN
SUBR Chancellor – James Llorens

12:00 p.m. LUNCH AND PRESENTATION
Presentation by Southern University - Shreveport

SESSION III
BUDGET RECOMMENDATIONS FOR FY 2011-2012
(Sources, uses and impact on services and staff)
1:00 p.m. SU SYSTEM Vice President Kevin Appleton
1:30 p.m. SUBR Vice Chancellor Flandus McClinton, Jr.
2:00 p.m. SUNO Vice Chancellor Woodie White
2:30 p.m. SUSLA Vice Chancellor Benjamin Pugh
3:00 p.m. SULC Vice Chancellor Terry Hall
3:30 p.m. SUAREC Vice Chancellor Adell Brown

4:00 p.m. STATE AND BOARD OF REGENTS POLICY IMPACT
Formula Funding – Vice President Appleton
Selective Admissions Implementation
Chancellor Llorens
Chancellor Ukpolo

4:30 p.m. HIGHER EDUCATION GOVERNANCE COMMITTEE
Mr. Patrick W. Bell

4:45 p.m. WRAP-UP SESSION AND EVALUATIONS
5:00 p.m. ADJOURNMENT
The Southern Strategy

A Return to Glory

Recommendations on the Future of the Southern University
System of Higher Learning

August, 2012

The Southern Strategy: A Return to Glory is a roadmap to begin the process of moving Southern toward a more secure, distinguished place in Higher Education. It has been reviewed and approved by the System Chancellors, and represents our collective thinking.

We recommend it for your consideration.

Ronald Mason, Jr. President, Southern University System of Higher Learning
The Southern Strategy is a strategic approach to enhance the competitiveness and long term viability of the Southern University System of Higher Learning. It envisions Southern as a model 21st Century system of higher learning and America’s Historically Black University model.

The strategies detailed below are necessarily aggressive. In a political environment that seeks to transfer its New Orleans and two year campuses to other systems, and impose increasingly draconian cuts on its flagship, it is not unreasonable to conclude that we face what are perhaps our greatest challenges. Indeed, the nation’s only historically black university system is in a struggle for its very existence.

Southern is at a crossroads in its history. We can continue to bleed from a thousand cuts as our flagship loses enrollment, staff and the ability to deliver critical services; or, we can accept the reality of our circumstances and respond in a proactive way by using the resources available and foreseeable to build a lean, efficient, globally competitive, state of the art institution of higher learning. The latter option is the vision of the Southern Strategy.

Over the course of the next four years, Southern will implement the following five strategies.

1. **Modernize the Academy and synergize Academic programs.**
   a) Identify system academic cores (SUBR December 31, 2011; Other Units December, 2012)
   b) Prioritize program offerings per campus, System wide (June, 2013)
   c) Develop System wide research support function (July, 2012)
   d) Strengthen International Programs System wide(July, 2012)
   e) Implement On-Line brand (January, 2012)
   f) Enhance Community College Articulation
   g) Enhance Dual Enrollment Opportunities

2. **Modernize and synergize support operations.**
   a) Prioritize fiscal support needs (December, 2011 –Phase I)
   b) Implement efficiencies
      I. Human Resources (September, 2011)
      II. Information Systems (September, 2011)
      III. Financial Support Operations (January, 2012)

3. **Increase private and public resources.**
   a) Strengthen the Jaguar Nation
      I. Southern Oath for all freshmen (Fall, 2012)
      II. System wide Core Values (January, 2011)
   b) Invest in appropriate staff (Begin July, 2012)
c) Invest in appropriate software (January, 2012)
d) Invest in travel (Ongoing)

4. Market a “new southern” built upon the traditions of the past.
   a) Raise funds for marketing campaign (October, 2011)
   b) Hire marketing firm (October, 2011)
   c) Support image change with bona fide performance (August, 2012)

5. Identify and strategically organize available and foreseeable resources.
   a) Right size Baton Rouge budget (August, 2011)
   b) Right size other unit budgets (August, 2012)
   c) Redesign system funding allocation model (June 30, 2012)

Each of these strategies and implementation recommendations are discussed below in more detail.

Modernize the Academy and synergize Academic programs.

Learning needs have changed over time and most universities are in various stages of understanding and adjusting to the new reality. Technological advances, ever changing job market and work force, student lifestyles and other evolutionary changes require both the faculty and college support systems to respond quickly if they are to maintain their relevance. In addition, the ability to change and adapt over time must be fused into the learning culture. In the past, learning was the goal. Now, learning how to learn is the goal of the modern student.

Southern has not kept up and must therefore adapt quickly. The change process at Southern actually started several years ago, though not always in a strategic fashion. After Katrina, SUNO was forced to drastically reduce its program offerings and coordinate what was left with the University of New Orleans. In response to a series of budget reductions, SUBR began reviewing and reorganizing programs last year. In addition, the Board of Regents has required that certain “low completer” programs be combined or eliminated, and that programs be aligned with workforce needs. Now, in light of another major budgetary challenge, SUBR has determined to identify and focus on core programs and to strategically realign its academic offerings. The goal is to lay an academic foundation upon which to build excellence. The SUBR will engage in a process to present its plan, Renaissance Southern, at the December Board meeting.
Over the course of the next year, a similar process will occur across the system. Academic cores will be identified, academic offerings will be prioritized, delivery will be coordinated and electronic assistance will be infused throughout. The ultimate goal would be to expand the breadth and depth of academic programs to all students enrolled in study at Southern, and deliver them through the best means available.

Learning today is global, and a Southern graduate will have to be globally competent. In addition to being able to think critically, he or she will require proficiencies in information systems, math, English and writing, and be exposed to a foreign language and an experience abroad. The plan is to provide the opportunity to travel abroad on a System wide basis by the end of next fiscal year.

An On-line College will be developed during the next year. Many students seeking on-line education are HBCU non completers. They choose the convenience of online, because they work while attending school. However, many often exhaust financial aid, incur high debt, and drop out before attaining a degree. Southern can offer a better product by expanding our hands on, nurturing culture to the on-line experience. This can be a potent revenue source over time. Implementation should begin January, 2011.

Our relationship with Community Colleges, for SUSLA four year universities, and High Schools will have to be strengthened. Articulation agreements will have to be activated; community college instruction on our four year campuses, vice versa for SUBR, and dual enrollment programs will all have to be expanded.

**Modernize and synergize business support operations.**

Business support systems must improve. Since SUBR provides much of the support for the Baton Rouge land mass and some support, such as human resources processing, for the entire system, much of the initial improvement must occur at SUBR. In August, 2010 Southern began the restructuring process by centralizing Internal Audit and Institutional Research. In January, 2011 key support areas System wide were analyzed with an eye toward improvement.

The System performed a program and operational audit in the Human Resource area. All Payroll Action Forms are processed by SUBR, but there is some duplication across the system. In addition, while staff heavy, many of the necessary skills are lacking within the operation. Implementation of Banner will help; but, in addition, we recommend the centralized management structure contained in Attachment I.
Information Technology was also assessed, because it is at the heart of almost everything the System and campuses do, including recruitment, admissions, student records, billing, grant administration, communications, accounting and so forth. In addition, the campuses have struggled and expended millions of dollars attempting to implement the Banner administrative software system. Technology is supposed to enhance opportunities to maximize revenue. In the case of SUBR, and therefore Southern, the opposite has been the case. Our recommendation, contained in Attachment II, is to synergize Information Technology according to a plan developed by the System in cooperation with the Chancellors. Doing so should improve service and reduce cost by approximately $300k at first cut. The process would begin in Baton Rouge and fold in the other units as service improves. The Chancellors will be responsible for implementation of the components on their campus and evaluated accordingly.

The third critical area is the finance area. Legislative audits have had repeat findings for over three years. Vendors complain of late or missed payments. The state required annual financial report is chronically submitted late. In addition, the new GRAD Act autonomies require System wide coordination. Staffs are thin and lacking necessary skills. People must trust that Southern’s fiscal affairs are in order if we are to be able to increase investment in our enterprise. We have recommended that a full operational audit of the finance area be performed by the System Vice President, in coordination with the Chancellors, with recommendations to be made for improvement by December 31, 2011. See, Attachment III.

**Increase private resources.**

The Jaguar Spirit has always been Southern’s greatest asset. However, it has been put to the test of late. Distrust is high and confidence is low in Southern’s ability to conduct its business well. One year ago, the System Office, SUBR, the Foundation and the Alumni Federation were all working at cross purposes, more like competitors than members of the same family. In addition, on-going litigation involving some current and former board members, and the former president, has not served Southern well. All of these things are vexatious of the spirit and disinclines people from investing in Southern.

Relationships have improved some during the course of the last year. There is, however, much work left to be done. The processes of rebuilding trust and fortifying the spirit must happen internally as well as externally. We are proposing the development of System Core Values to be shared by all units. We also propose the crafting of a Southern Pledge, to be made a part of the orientation of all incoming freshman.
In addition, as fundraising increases, some will be reinvested into staff, software and travel when possible, to expand fundraising activity over time as described in Attachment IV.

**Market a “New Southern” built upon the traditions of the past.**

It is essential to reverse the trend of reduced enrollment at SUBR. In order to do so, we will have to get the word out about the “new” Southern: the 21st century, efficient, cutting edge, global learning community. Professional marketing will be necessary to make an immediate impact. Attempts will be made to raise private funds to pursue this important strategy.

However, we can’t talk it if we are not walking it, which means that the above mentioned strategies must be well underway. This is especially true since most of the enrollment challenges we have are not incoming students, but rather students who enroll at SUBR (the extreme example) and transfer to another institution. We must turn our students into our best recruiters by improving their campus experience and celebrating it to the world!

**Identify and strategically organize available and foreseeable resources.**

We have more enterprise than we have resources to run effectively. SUBR is the most critical, but budgets are thin across Southern. The first step in matching resources to operations will, of necessity, occur at SUBR. It will have to be financially and programmatically restored by FY 1012 – 1013. Over the course of the next two years, we will also work with Chancellors across the System to realistically assess resource levels, structure, and staffing. In addition, the campuses pay a fee to SUBR for services that in some cases are not competently provided. Indeed, some units duplicate the purchased service in order to ensure that the work gets done. The goal is to have a funding model that distributes resources fairly across the system, pays fairly for actual services provided, and is stable such that each unit will be better able to engage in long term planning.

**Every challenge presents a corresponding opportunity. While the challenges for Southern are great, they are not insurmountable. However, incremental change is not an option. The forces of possible demise are persistent, and on our door step. Our greatest challenge is time. Our actions during the next few months, beginning with the August Board meeting, must be well planned but also aggressive, decisive and quick. Unity of purpose, projected to the external world is also essential. Finally, the paramount motivation going forward must be an unwavering commitment to a better future for Southern and the students it serves.**
HUMAN RESOURCES AUDIT
and
RECOMMENDATIONS

August, 2011

Evola C. Bates, Chief of Staff
Brandon Dumas, Deputy Chief of Staff
Tramaine Breaux, Intern