

**STARLINK<sup>®</sup>**

presents

# **Creative Strategies for Tough Financial Times**

## **Participant Packet**

**October 30, 2003  
1:30 - 3:00 PM CT**



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of Community Colleges

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"Creative Strategies for Tough Financial Times"

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## "Creative Strategies for Tough Financial Times"

Logos and Opening Credits . . . . .	2:30 pm (all times Eastern)
Introduction and Overview . . . . .	2:31 pm
Video segment for Jess Carreon . . . . .	2:35
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Video segment for Rich Pattenaude . . . . .	3:19
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Summary . . . . .	3:54
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*\*Subject to change*

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(If the line is busy when you call, please try again.)

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**On October 30: (972) 669-6633**

**E-MAIL:** Send your questions or comments to the panelists via the internet to [teleconferences@dcccd.edu](mailto:teleconferences@dcccd.edu).

***PLEASE put "Creative Strategies" in the subject line.***



### The PANELISTS:

Dr. Jesus "Jess" Carreon, fifth chancellor of the Dallas County Community College District, brings the wisdom and experience of a community college graduate and a higher education administrator to the students and faculty of one of the nation's largest community college systems. He also represents a voice of national leadership in higher education as 2003-2004 chair of the board of directors for the American Association of Community Colleges. Dr. Carreon comes to DCCCD from Portland (Ore.) Community College, where he served as president since 2001 of the multi-campus system and its more than 45,000 students. Prior to his tenure at PCC, he was president/superintendent of Rio Hondo Community College District in Whittier, Calif. From 1995 to 2001; and president of Ventura (Calif.) College from 1992 to 1995. In addition to other positions in higher and secondary education, Dr. Carreon has private-sector experience as former manager of a family-owned construction business, Carreon Enterprises. He also is immediate past president and a member of the board of directors for the National Community College Hispanic Council; serves as a member of the president's advisory committee for the Association of Community College Trustees; and is a member of AACC's Future Leaders Advisory Board. Dr. Carreon's education includes: an associate's degree from Grossmont College in San Diego, Calif.; a bachelor's degree in history from San Diego State University; a master's degree in organizational development and behavior from the University of California-Irvine; and a doctorate in higher education from the University of Southern California, with a specialization in legal issues in higher education. Jess Carreon and his wife, Susan, have a blended family that includes four children and seven grandchildren.

Dr. Millicent Valek became Brazosport College's fourth President on September 1, 1996. A professional educator, Millicent began her career as a Speech teacher for the Austin Independent School District in 1972. She began working at Austin Community College in 1979, first as an adjunct instructor and then as a mid-level manager. In 1988, she joined the staff of Arizona Western College in Yuma Arizona as the chief academic officer. Millicent served as Vice President for this multi-site community college district for eight years prior to being named president of Brazosport College. Millicent serves on a number of boards including the Brazoria County Partnership, Junior Achievement, Brazosport Chamber of Commerce, Brazosport Memorial Hospital, Dow's Citizen Advisory Panel, and Association of Texas Colleges and Universities. In addition, she is a member of the Brazosport Rotary Club. Born in Brownsville Texas, Millicent attended the University of Texas at Austin graduating with a

B.S. in Secondary Education and subsequently attended Southwest Texas State University where she received her M.Ed. in Educational Administration. In 1988, she earned her Ph.D. in Educational Administration through the Community College Leadership Program at the University of Texas. In 1997, Dr. Valek was named a Distinguished Graduate of the College of Education at the University of Texas. Millicent has one son—Mike who received his B.S. from the University of Arizona in Tucson and is currently attending Law School at the University of Texas. Millicent also has a wonderful daughter-in-law, Angela Valek. Glad to be back in Texas, Dr. Valek proudly calls Lake Jackson home.

**Dr. Richard Pattenau** became president of the University of Southern Maine in July of 1991, after serving for five years as vice president for academic affairs at Central Connecticut State University, an institution of nearly 14,000 students in New Britain, Conn. Prior to that he served for five years as associate vice president for Academic Affairs at the State University of New York at Binghamton. Before moving to New York, President Pattenau was a member of the political science faculty and an associate dean for six years at Drake University in Des Moines, Iowa. A native of Seattle, Washington (b. 2/22/46), he earned his bachelor's degree with honors in economics at California's San Jose State University and his Ph.D. in political science at the University of Colorado. His areas of expertise and publishing include American government, university leadership, public administration and organizational theory. Rich, his wife, Michele, and their daughter, Lauren live on USM's Gorham campus. Not long after his appointment to USM in July of 1991, Rich said, "A modern university should be of its community, not just in its community." One of his top priorities is to ensure that USM makes a difference in the communities it serves. He has made a personal commitment to that priority by becoming actively involved in numerous community and business ventures. To cite a few examples, Rich currently serves, or has served, as a board member of the Portland Museum of Art, World Affairs Council, Blue Cross/Blue Shield, the Maine Science & Technology Foundation, Chamber of Commerce, Maine Development Foundation, the Gulf of Maine Aquarium, United Way, Maine Medical Center, Institute for Civic Leadership and the Portland Symphony Orchestra. Rich is working to create and further strengthen USM and the linkages between USM and our external communities. He is directing the implementation of a strategic plan which states in part, "The University of Southern Maine will be known nationally for being a valued community asset that is a source of pride for the people of southern Maine, worthy of public and private investment..." . Under his leadership, USM is responding to today's challenges by engaging in strategic planning that is both "optimistic and aggressive," reflecting a desire to provide southern Maine with a rigorous and responsive public university. USM has grown in the process, and with over 11,000 student on three campuses, is the largest university in Maine.

Dr. P. Anthony Zeiss holds a doctorate in community college administration, a master's degree in speech (radio and television) and a bachelor's degree in speech education. In 1992, Zeiss became the third president of Central Piedmont Community College, the largest college in North Carolina serving approximately 70,000 students per year. During his tenure, the college has grown from one campus to six and has become recognized as a national leader in Workforce Development. Zeiss has authored or co-authored several books on economic development, adult literacy and national workforce development. His most recent publications include three books on creating high performance employees, a novel based on the War Between the States, and a book on Community College Leadership. Zeiss has published more than 50 professional articles, papers, research documents, and over 400 newspaper columns. Dr. Zeiss is a professional speaker and a member of the National Speaker's Association. He is a frequent keynoter for companies and colleges on recruiting, developing, and retaining peak performers at the workplace. He regularly consults with States and regions on Economic Development Enterprises. Zeiss is past chair of the Board of the American Association of Community Colleges and was a member of the U.S. Vice President's 21st Century Workforce Development Leadership Task Force in 1999-2000. In 1998, he represented America's community colleges at the UNESCO World Conference on Higher Education in Paris, France.

### The MODERATOR:

Dr. J. William Wenrich is the former chief executive officer for the Dallas County Community College District (DCCCD), the largest undergraduate institution in Texas. The seven college District serves about 60,000 credit and 67,000 non-credit students each year. Immediately prior to coming to Dallas in 1990, Wenrich was Chancellor of the San Diego Community College District, the second largest two-year system in California. Additionally, he has been President of both two- and four-year colleges in Michigan and California. Fluent in Spanish, Wenrich served both private industry and the U.S. Department of State in Central and South America. In addition, he has acted as a consultant in the areas of adult vocational education and community development and has authored two books and numerous articles on these subjects. He is a past President of the Texas Association of Community Colleges; he serves on the Board of the Continuous Quality Improvement Network; and he is a past Chairman of the Board of the League for Innovation in the Community College. A cum laude graduate of Princeton University, Dr. Wenrich earned his Ph.D. in Community Adult Education from the University of Michigan. Previously, he moderated DALLAS TeleLearning teleconferences "Accreditation on Trial: Who Needs It?" and "With a Little Help from my Friends: Implementing Information Technology into the Curriculum."

## ADVISORS

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We gratefully acknowledge assistance from the following individuals  
in the creation of this teleconference:

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## Overview of "Tough Financial Times"

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The financial picture for higher education is bleak indeed. The *Chronicle of Higher Education* reports that for 2003-04, about half of the states cut funds for higher education. And most of those that granted increases gave very small ones, many of which were less than the rate of inflation.

The *Chronicle* also explains that state priorities shifted away from higher education during the 1990's and toward prisons, health care, and K-12 education. The result is that the funding left over for colleges and universities will not cover the cost of basic operations. This economic crunch could not have come at a worse time: the traditional college age population is increasing, and growing numbers of people need re-training to find jobs. Both are leading to increasing enrollments---if colleges can find the money to offer enough classes to meet the increasing demand.

In California, the state's financial woes have resulted in colleges setting limits on enrollment, a step never taken before. This restriction comes despite the increase in the number of college-age students in the state. Funding is decreased by 10% for the University of California, 7% for California State University, and 4% for community colleges. Last spring the 108 community colleges cancelled about 8,000 courses, losing an estimated 90,000 students.

In many states community colleges are taking such major financial hits that their traditional mission of an "open door" to all students is in jeopardy. Open access suffers as options such as tuition hikes, enrollment caps, and instituting admission standards have to be considered. Many other colleges and universities find themselves with few options. The American Association of Community Colleges says all of the states it surveyed are increasing tuition for 2003-04.

One of the states increasing tuition by 20% or more is Oregon, and Portland Community College is included. The recession caused a state budget deficit of about \$1 billion, or 10%. After voters defeated a proposed increase in the state income tax, the legislature cut budgets for universities about 9% and for community colleges about 12%. Portland managed its budget cuts by reducing or eliminating 34 academic and professional technical programs, eliminating administrative, classified and faculty positions, and raising tuition by 28%. This fall Portland has had to turn away students for the first time in its history because many of the classes are filled, and there's no money to add any.

In Texas, the current state budget includes a 1.5% increase in higher education, which was less than the inflation rate. The Dallas County Community College District, with seven independently-accredited colleges and a credit enrollment of 65,000, is dealing with a 20-year decline in funds from the state. In 1984, 73% of the DCCCD's general operating funds came from the legislature. In 2002, the state provided 40%. More funding now comes from local taxes than from the state. Note: State funds are estimated to be 35.9% of the DCCCD general operating budget in 2003, and 36.5% in 2004.

In the budget passed by the legislature this summer, the DCCCD faces a cut of about \$4 million a year for the next two years. That seems like a small decrease, until it's measured against an enrollment increase of 17%. And, growth in enrollments in the DCCCD is projected to continue for a variety of reasons---including increases in minority participation rates, and a pressing need for more post-secondary and technical education and training.

Another reason it is expected to increase is the economy, because history has taught us that in a strong phase with a low unemployment rate, credit course demand tends to decrease, but in a weak phase with a high unemployment rate, the credit course demand tends to increase. Also, 80% of the jobs created over the next 20 years will require more post-secondary education and technical training.

Challenges for the DCCCD in this decade will include:

- Economic fluctuations
- Competition for state and local funds
- Increased need for an educated and trained workforce
- Need to “increase capacity” to meet demand
- Changing demographics, technology and workplace

The Dallas district has dealt with its financial pinch in several ways: curtailing summer school classes by having only some of its seven colleges open for the first summer session, and the others for the second; raising tuition; and increasing local taxes.

In the near future, DCCCD enrollment is projected to increase because of:

- Increases in minority participation rates
- Increases in university tuition
- Limits on university freshman class admissions
- Aging “baby boomers” and life-long learning
- Increased need for more post-secondary and technical education and training

The Dallas County Community College District is fortunate because its Board of Trustees has consistently required sound financial management, so the District is able to withstand the current financial problems better than many other colleges. The District also benefits from having some flexibility in managing its finances: it can levy local taxes and can carry a fund balance of local dollars not expended. Still, Dallas felt the pinch of tightening budget dollars, and it will continue to, given the impending conditions described above.

## "Weathering the Storm: Positive Reactions to Negative Budgets"

By Tony Zeiss and Becky Paneitz

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From the League for Innovation in the Community College's online publication

*Leadership Abstracts*, June 2003 – Vol 16, Number 6

Available at <http://www.league.org/publication/abstracts/leadership/labs0603.htm>

Economic downturns have decreased budgets within community colleges to unprecedented levels. Not only are public revenues down significantly, but enrollments are up, and competition from the private sector is increasing. Central Piedmont Community College (CPCC) has 70,000 students, six campuses, and not enough public money to support them properly. In reviewing the revenue stream, the administration at CPCC knew that something had to change. In order to survive, the college became more market sensitive, more efficient, more customer focused, and more entrepreneurial. CPCC became a better institution for addressing these fiscal challenges because the situation required that all campus constituencies work together.

Community and technical college presidents and administrative personnel can develop positive reactions to these negative budgets. Campus leaders must stay optimistic and develop and maintain a positive institutional image. CPCC launched a double-pronged approach; it has not only decreased expenses, but it has also increased revenues.

### **DECREASING EXPENSES**

CPCC has worked diligently for the past couple of years on various ways to decrease expenses while protecting the quality of education it offers and minimizing negative impact on its students and employees. Seeking better efficiencies of operation is a preferable solution than reducing services or trimming personnel. Specific steps were taken by the instructional unit at CPCC, including increasing class size from a 15-to-1 student-teacher ratio to a 19-to-1 ratio. Additional students were added only to classes where quality was not jeopardized. The college's Virtual Campus offered additional classes with higher student capacity, and used teacher assistants to help faculty members with grading, answering student questions, and completing paperwork. To ensure optimal classroom space and time use, CPCC purchased room-scheduling software that matches the appropriately sized room, based on student enrollment, to each class section.

The instructional unit then examined its many programs, identified those with declining enrollments, and began an innovative and proactive three-year process to revitalize or eliminate them.

In instances where there was a continued demand for a program, the revitalization process matched it with needed resources, including marketing assistance and funding. Following these efforts, a decision was made whether to continue the program, move the classes into the college's Corporate and Continuing Education division as noncurriculum classes, or terminate the program. So far, 19 programs have been involved in these revitalization activities.

Faculty contracts were examined and transitioned from a 12-month, 42-credit-hour teaching load to a 10-month, 36-credit-hour teaching load. While this might not appear at first glance to be efficient, in fact it maximized faculty loads during fall and spring semester, increasing the Full-Time Equivalency (FTE) reimbursement the college receives during those semesters. Faculty members endorsed this change, and faculty salaries were fully maintained. The contract revision affected a cost benefit to the college of approximately \$250,000 per semester.

While full-time faculty members were teaching 18 credit hours during the fall and spring semesters, the college was faced with the summer semester, for which state reimbursement was only 10 percent of the fall-spring rate. CPCC decided to offer classes only in high-demand areas, usually in general education, on a self-supporting basis. Tuition and fee costs remained the same, so that this change was transparent to the students. This decision generated \$125,000 in summer term tuition, which would be used for future operational costs.

A compressed-degree track was developed for students interested in accelerating their goal attainment. Although it was a challenge to convince division directors and program chairs to change their courses into a different format, compression was successfully accomplished. An associate degree is now available in a fast-track, eight-week session format, and virtual classes are also being offered in the shortened format.

Another technique that proved successful was to employ a process of continuous enrollment management. In order to assess enrollment trends, the number of seats assigned in classes was closely monitored. A process was implemented for identifying students who had not yet declared a program, and advising was initiated to place them in their programs of interest. In order to provide advising prior to students' leaving for the summer, and to positively impact retention rates, a pre-fall schedule was made available in early spring so that students could preregister for the upcoming fall semester. To facilitate this effort, a master schedule of all course offerings for each of the six campuses was developed.

Finally, additional tactical measures were implemented, including increasing deans' responsibilities in both instructional program oversight and campus management. Release time was limited for full-time faculty, except in the case of critical projects, and all full-time faculty hiring decisions were based on class enrollments and a high demand for those program graduates. Finally, 119 administrators taught classes for no extra compensation.

## INCREASING REVENUES

"While federal, state, and local funds will probably remain the largest source of community colleges' revenues, they must transform from being public-supported organizations to becoming public-assisted organizations," Tony Zeiss wrote in a recent Association of Community College Trustees magazine article. "The economy and the state budget cuts have been a wake-up call. The good times are not going to come back." At CPCC, complementing efforts to decrease expenses were initiatives designed to increase revenues. The two major ways to succeed have involved (1) solicitation of gifts and donations and (2) implementing an entrepreneurial plan of charging fees for services.

The CPCC Foundation is charged with raising money to help support the college through endowments and planned giving, and by sponsoring special events and running a major capital campaign. With the direct assistance of the college president, the foundation implemented a highly publicized and successful campaign for class sponsorships.

Increasingly, boards of trustees and college presidents are being charged with responsibility for fundraising. Many trustees and presidents do not feel comfortable in this new role. Campus leaders who need training should contact the American Association of Community College's Council for Resource Development. Some basic tips for effective fundraising apply:

- Presidents should be, or have training to become, skilled fundraisers.
- Colleges should develop and maintain positive organizational images.
- Trustees, presidents, and resource officers must collaborate.
- Positive relationships with prospects must be developed and nurtured.
- Requests for specific purposes must be made.
- Colleges must offer opportunities for significance; begging seldom works.
- Colleges must partner with businesses and other community organizations.
- Donors must be recognized often and loudly, both internally and externally.
- Colleges must prove to be good stewards of funds.
- Trustees and Presidents must be donors themselves.

CPCC's endowment decreased nearly \$2 million as a result of the depressed economy. Faced with such a situation, it is incumbent upon college leaders to concentrate on rebuilding their institution's endowment. This is a delicate and evolving process. It is a mistake to wine and dine people when they give you money and then forget them. Rather, one must cultivate people continuously for capital campaigns: develop these relationships by having students talk to them; provide follow-up to the donors on the impact of their monetary gift; and ensure that they stay involved with the institution. As college endowments are increased, future generations of students are provided with an unequalled legacy of opportunity.

These new fiscal challenges require that trustees and presidents provide leadership in advancing their colleges into educational enterprises. Colleges must identify new methods of generating additional revenue streams to augment insufficient state support. Institutions can establish 501(c)3 fee-for-service organizations, allowing them to become more entrepreneurial in seeking nontax dollars. One way to accomplish this is through contract training and forging partnerships with government, businesses, other institutions, and the community. Colleges have proven to be successful in contracting with sales people and trainers, are becoming more adept at marketing their services, and often develop very profitable and long-term relationships with those whom they train. Areas where contract training has been successful include computer training, supervisory and leadership training, workplace literacy, industry-specific training, and the operation of assessment centers for businesses.

Finally, CPCC increased its efforts at garnering its fair share of federal, state, and local public funds. Increased dialogue with policymakers has been high on the president's agenda, and it has paid off. In 2002, CPCC received the highest increase in county funds, and the North Carolina Community College system received the highest increase in state funds this past year. In addition, through the help of CPCC's congressional leaders, the college received over \$1 million in earmarked funds from the federal budget. Optimism and hard work does indeed pay off.

Economic downturns have decreased most community college budgets as at no other time in history. Colleges must tackle this issue with resolve by making some tough decisions in order to keep the open door of opportunity from closing. College presidents and their boards must realize that raising money from a variety of sources in numerous and innovative ways is now an integral part of a college's financial strategy. As institutions raise more money, they also will gain more control of their destinies, and having increased financial independence will certainly be to the benefit of the students served by community colleges.

*Tony Zeiss is President and Becky Paneitz is Vice President of Central Piedmont Community College.*

## INNOVATIVE INITIATIVES AT BRAZOSPORT COLLEGE

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### **Center for Business and Industry Training (CBIT)**

The Brazosport College Center for Business and Industry Training began in 1992 when the college responded to a request for proposals from Dow Chemical Company for computer training. The challenge was certainly there. Industry wanted quick responses and classroom trainers with industry and consulting experience. They wanted quality assurance in curriculum and experts in delivery using all of the tenants of adult learning theory. They demanded a physical environment more indicative of a conference center than a classroom. And most importantly, they wanted no excuses for why something couldn't be done. The CBIT's mission was quite simple – to provide business and industry training in a manner that is cost effective, timely, and high quality.

For Brazosport College, the internal organization of the CBIT was a dramatic departure from business as usual. Administrators decided that CBIT would be a totally self-sufficient unit of the college with no expectation for state aid, and, therefore, none of the obligations that come with the acceptance of state funding. This meant setting up a new kind of cost structure for all aspects of the operation and hiring trainers and consultants outside of academe.

Eleven years later, the CBIT is housed in the new 45,000 square foot state of the art Corporate Learning Center. The staff of 15 full time employees and 15 part time trainers is currently working with over 10,000 employees from more than 25 companies in training programs related to computer applications, diversity, OSHA compliance, statistical quality control, process technology operations, software conversion projects, individual consulting, job skills assessment, computer-based instruction, and others. The CBIT has also been able to do much more than pay its own way. It has developed revenue sources to expand programs, provide initial support for a portion of the building program, and contributes funds each year for retirement of construction bonds.

### **Brazosport College Thanks Community for Generous Support of Successful Capital Campaign**

In January 2002, Brazosport College officials addressed a gathering of campaign donors and press representatives to express appreciation for generous support of the college's first-ever capital campaign, supporting a broad, multi-phase facilities expansion program. Brazosport College President Dr. Millicent Valek said, "Our campaign's success is the direct result of the momentum this community provides; it's what keeps us going and growing. The strong support of the community has very positive effects on our work here."

To date, contributions to the "Building a Legacy" campaign total \$ 5,733,481 Major donors to the "Building a Legacy" campaign include The Dow Chemical Company, BASF Corporation, Shintech, Inc.,

BP-Chocolate Bayou Works, U. S. Contractors, Phillips Petroleum, The Carmage & Martha Ann Walls Foundation/Brazosport Facts, Industrial Specialists Inc., Offshore Oil Services, Miken Specialties, Ltd., Reliant Resources Foundation, Mrs. Marguerite Davidson, and Mrs. Doris Williams. Hundreds of additional contributions have been made by Brazosport College employees, companies, or individual donors and their family members. The Houston Endowment's Challenge Grant, which required a local match, also played a vital role in meeting the campaign goal. Community representatives instrumental in the campaign's success include Brazosport College Board of Regents, the college's Foundation Advisory Council and the "Building a Legacy" Steering Committee led by Doris Williams, chair, and Barbara Monical, vice-chair.

Phase One of Brazosport College's facilities expansion project, a two-story Corporate Learning Center, and a Child Development Center with fenced and covered play areas, is currently complete. Phase Two involves classroom remodeling and the expansion of classroom facilities. The final facilities expansion project phase is the construction of a Music Performance Center. All three phases of these projects are scheduled for completion by the end of 2005.

### **Brazosport College Makes History**

The Texas Higher Education Coordinating Board recently announced that Brazosport College had been selected to proceed with the development of a Bachelor of Applied Science/Technology degree. Brazosport College was one of three institutions selected from among the state's 50 community colleges to be a part of this innovative endeavor. Ground breaking legislation, authored by Representative Dennis Bonnen and introduced in the Texas Senate by Senator Kyle Janek, provided the authority for Brazosport to offer this degree.

Brazosport College President Millicent Valek sees this pilot project as an incredible opportunity for students, industry, and the entire Brazosport area: "Students can further their education without having to relocate or leave their jobs and can do so at a significantly lower cost than at a senior college. This program provides students and employers with unprecedented flexibility." The specialized degree is not currently offered in the state of Texas.

The proposed Baccalaureate degree will build on Brazosport College's Associate degree programs in the chemical and industrial technology areas. Prime candidates for entry into the program are high school graduates as well as those holding associate degrees in specified technical areas. While the associate degree provides necessary technical skills, the upper division courses are designed to provide the skills required for advancement as a supervisor or manager.

Plans for the development of this program have begun this fall. It is anticipated that it will take approximately one year for development, approval, and accreditation of the program.

THE UNIVERSITY OF SOUTHERN MAINE'S  
CREATIVE STRATEGIES FOR TOUGH FINANCIAL TIMES

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USM, along with its colleague institutions in the system and across the nation, faces declining state budgets. Universities nationwide can expect a continued restraint of resources, even as the economy eventually rebounds. In fact, the National Governors' Association -- citing an eroding tax base and the explosion in health care costs -- reports that the budget problem for states nationwide is "long-run and structural." In a recent cover story in *Change* magazine, authors Alan E. Guskin and Mary B. Marcy note the futility of addressing higher education's fiscal problems through the time-honored practice of incremental budget cuts. It will lead only, in their words, "to a slow and inexorable erosion of the nature of the academic profession as we know it, and of the quality of the educational programs and student learning that this profession has sustained."

Without a doubt, we are entering a period of profound change in higher education -- not just in terms of public support. The very role of public higher education is shifting. As our society has shifted to a knowledge-based world, we are not only expected to educate good citizens, we must also serve as a major force for economic development.

USM has already faced and met the financial challenges of the 90s, thanks to a dedicated and creative faculty and staff. In the spring of 1996, in the wake of the severe fiscal constraints of the early 1990s, we approved an aggressive strategic plan that called for thoughtful investments and reallocations that would allow the university to add programs and facilities in response to clearly defined community needs. "Careful attention," we noted in the plan, "must be paid not to simply shift credit hour production but to actually increase it through the attraction of new students." We've added some 15 new programs \* among them, bachelor's degrees in linguistics, sports medicine' master's degrees in health policy and management, social work, accounting, creative writing; and a Ph.D. in public policy; and a recently approved doctoral program in school psychology. Using dedicated state bond monies, user fees, and/or private fund raising, we have completed, or have underway, nearly \$80 million in improvements to our physical plant. Those include a sports complex to improve campus life and house the sports medicine program; a new residence hall to appeal to traditional-aged students; an advanced technology center to provide academic programs and consulting services needed by Maine industries; a community education center to enhance the University's ability to serve its region; expansion of the library; and a new bio-science research facility.

USM continues its successful trend: experiencing growth in reputation, size, value, and impact, but this growth comes at a time when we must also trim budgets to keep administrative costs down.

The challenge, therefore, becomes finding a way to meet unyielding financial concerns while also moving the institution forward on its mission of teaching, scholarship, and service. THE STRATEGIES OF THE PAST won't be sufficient to meet what's expected of us in the coming years. Accomplishing this will call for the best from each of us.

USM is preparing to make strategic choices about who we are and where we are going. Those choices, as difficult as they may be, are essential if we are to protect the quality of education our faculty, staff and community supporters have worked so hard to create.

### **HOW WILL WE DO THAT?**

The guideposts were set in October of 2000, when the USM Board of Visitors released "The Southern Maine Imperative: A Report on the Higher Educational Needs of Southern Maine in the 21st Century." That independently funded report -- based on feedback from more than 200 community and business leaders -- stated unequivocally that USM's quality is critical to the region's economic and cultural well being. That report is the foundation on which we have based development of "The USM Plan: Achieving National Recognition for Regional Excellence," a bold, long-term plan by which USM will become recognized nationally as an invaluable Maine resource worthy of significant public and private support. Every two years, we implement a work plan with a set of measurable steps to ensure that we achieve the goals of this plan. (Copies of these plans are available at <http://www.usm.maine.edu/~pres/>)

We also have initiated a process to make a fundamental shift in the way we do our work. Given the continued economic pressures we will face, and the growing need for accountability, we need to use our resources more wisely. If we don't, we will be hard-pressed to keep our academic goals intact, to continue our community service, and to support our faculty and staff. Every dollar we can free up from an outdated business process, we can put toward improving classrooms and operating budgets. We also need to make sure that our offices and departments are organized in a way that fully utilizes the skills of our employees. We need to explore new instructional strategies that will continue to improve student learning outcomes.

The transformation of our organizational systems will be challenging, but we've embraced a process to make a fundamental shift in the way we do our work, guided by a vision focused on student learning and the quality of our work lives.

The work plan for 2003-2005 will focus on implementing budget reductions and long-term restructuring that address mounting fiscal challenges in such a way that we can remain on track in pursuing our goals. This proposed work plan is a series of carefully considered steps which combine budget reductions, revenue enhancements, and organizational restructuring.

**PRINCIPLES**

The intention is to pursue actions that are creative but not risky, painful but not destructive, and strategic \* not simply opportunistic. To do so, certain principles were established by the President's Staff. These are:

- we must work to protect the academic core of the institution;
- the expertise of our faculty and staff is our most valuable asset;
- creative and entrepreneurial management of resources will help us to sustain our momentum and to use our resources wisely; and
- revenue generation, where appropriate, can be implemented to offset costs.

**Year 1 Actions (2003/04)****Target: \$1,300,000**

**Year 1** is dominated by cost reductions that impact programs and were driven, in part, by our need to move quickly. There will be a considerable number of vacancies and cancelled positions, but no lay-offs are proposed at this time. Revenue generation also helped minimize the impact on our people. However, given that we have already in the past year taken \$2.4 million out of our budgets, there is little flexibility left. Each division has been discussing plans in more detail.

**Year 2 Actions (2004/05)****Target: \$550,000**

**Year 2** will be handled far differently and poses a much greater challenge. Throughout the country organizations under fiscal stress are eliminating people and cutting programs. Rather than take this simplistic and damaging approach, we must look very closely at our internal workings to see if we can rethink, reconsider, and redesign ourselves. Our goal will be to realize long-term savings, greater efficiencies, and better services. In many areas we have worked in ways that reflect history and happenstance more than conscious design. We need to work together to change that or else we will face much deeper budget cuts and position reductions. USM will embrace this effort in order to meet its Year 2 financial goals. It is the first step towards creating a stronger culture of sustainability at USM.

**Work Restructuring and Reorganization Initiative**

As noted earlier, budget reductions represent permanent, not one-time, cuts. Consequently, the Work Restructuring and Reorganization Initiative is more than simply an effort to generate needed resources so that we can prosper and build a national reputation for regional excellence. If this initiative is to be successful, it must reflect and support our core institutional values, among them a commitment to faculty and staff to provide a stimulating work environment and to provide opportunities for personal and institutional growth and development. As a first step, A University Review and Improvement Committee (URIC) is seeking input and feedback to develop a plan that will: 1. Identify ways to cut

\$550,000 from the fiscal year that runs from July 1, 2004 to June 30, 2005, and: 2. Develop a process to transform our campuses in such a way that we realize long-term savings, more effective services and, ultimately, improve the campus environment for students, faculty and staff. In the end, the proposal will come to the President's Staff for a final decision Implementation will not be easy, but working together we can sustain the quality of the student experience and the value of scholarship and services we provide to the people of Maine.

Our ultimate goal is to take advantage of this university's intellectual resources so that in five years, two things will happen: USM will be a better place to go to school, and a better place to work.

Excerpts from  
"Diversifying Campus Revenue Streams:  
Opportunities and Risks"

by James C. Hearn

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American Council on Education – Center for Policy Analysis  
available online at [http://www.acenet.edu/bookstore/pdf/2003\\_diversify\\_campus.pdf](http://www.acenet.edu/bookstore/pdf/2003_diversify_campus.pdf)

### EXECUTIVE SUMMARY

The primary leadership challenge for college presidents today is to maintain high quality and competitive standing in the face of menacing resource constraints. To meet this challenge, many institutions have begun to adopt more business-like perspectives, particularly by aggressively pursuing alternative revenue streams. This report considers why colleges and universities are diversifying their revenue streams, then examines how they are doing so. Specifically, revenue-seeking efforts are investigated in eight domains:

- *Instruction*, including online programming and niche-oriented non-degree programming.
- *Research and analysis*, including technology-transfer initiatives, business incubators, and e-commerce initiatives.
- *Pricing*, including differentiated pricing and user fees.
- *Financial decision making and management*, including venture capital investment, as well as participation in arbitrage and option markets.
- *Human resources*, including compensation incentives for entrepreneurship and retirement/rehiring incentives for faculty.
- *Franchising, licensing, sponsorship, and partnering arrangements with third parties*, including logo-bearing clothing, tours and camps, and event sponsorship.
- *Auxiliary enterprises, facilities, and real estate*, including on-campus debit cards, facility rentals, and alumni services.
- *Development*, including appeals to donors abroad and other efforts.

This report also synthesizes the research on decision-making processes regarding new revenues. That analysis stresses that the ultimate goal of any revenue-diversification effort should be the generation of new net returns, not simply a generation of new revenue. Potential returns can be nonfinancial as well

as financial, and can come in the short or long term. Producing new institutional revenues that are fully offset or even dwarfed by new, associated costs is acceptable only if there are notable nonfinancial returns and if the new net costs are viewed as acceptable from an individual, institutional, or public perspective. If the pursuit of new revenues themselves becomes a major institutional focus, it should be with the understanding that new revenue-oriented initiatives will be undertaken only after rigorous consideration of the associated costs, including the opportunity costs of forgoing other initiatives.

Thus, effective decision making on any prospective initiative should be institution-specific and should consider factors not easily monetized. Because each college or university faces a distinctive context shaping its choices, there is no one best approach to decision making about revenue initiatives. Nevertheless, the literature suggests a number of general considerations and guidelines related to mission and culture, strategic analysis, and implementation, as well as to finances and cost-effectiveness. These are reviewed in turn in this report.

Of course, some revenue-seeking choices will affect the institution only at its periphery. Usually, no substantive strategic or philosophical debate need accompany a choice to rent aquatic facilities for a high school swimming tournament, for example. Other revenue-seeking choices, however, raise the possibility of more profound change. The report concludes by addressing a critical question: "What place does institutional mission hold in choices concerning institutional revenue streams? Offering degrees online, for example, involves the "brand" of the institution in a very fundamental way. In those circumstances, institutional leaders should ask: "Is this effort truly core to who we are and who we want to be? Is this a legacy I wish to leave as a leader?" At its worst, the pursuit of new revenues can be mindless and dispiriting. It is essential that institutional leaders help fashion a path that coheres and motivates all on campus. When ideas for new revenue streams may be promising in a business sense but threatening in a cultural and organization sense, and perhaps do not serve the public good, the best choice may be to walk away. When promising ideas are also inspired and inspiring, however, wisdom may lie in accepting the challenge of change and moving forward.

"EXAMPLES OF NONTRADITIONAL REVENUE-GENERATING INITIATIVES"

Instructional Initiatives

Test-preparation programs  
Retiree-oriented courses  
Programming funded by state  
for workforce training

Unitized investment pools  
Venture-capital investment  
Participation in arbitrage and  
options markets  
Revolving funds  
Internal cross-subsidization

Research and Analysis Initiatives

Technology-transfer offices  
Start-up firms  
Business partnerships  
Business incubators  
Research parks  
E-commerce sales of institutional expertise  
Fee-based information services

Human Resource Initiatives

Limits on external consulting for faculty  
Compensation incentives for revenue  
generation  
Retirement/rehire incentives for  
senior faculty

Pricing Initiatives

Differentiated pricing  
Unbundling of user fees for services

Franchising, Licensing, Sponsorship, and  
Partnering Arrangements with Third Parties

Tours and camps  
Concert series  
Sponsorships of on-campus events

Other Financing Initiatives

Outsourcing contracts with revenue guarantees  
Distributed learning partnerships  
Logo-bearing merchandise licensing

On-campus debit cards  
Off-campus extensions of debit cards  
Financial services  
Facility rentals  
Alumni services

Initiatives in Auxiliary Enterprises, Facilities,  
and Real Estate

Upgrading athletic facilities

Development Office Initiatives

Appeals to donors abroad

"Questions for Discussion and Institutional Research"  
Strategic Analysis

1. Do we have an up-to-date assessment of our strategic position, including our areas of strength and promise as well as our areas of vulnerability and threat? For example, what are the comparative advantages of this institution as it considers new revenue initiatives? Are people with appropriate expertise and authority being included in making these judgments?
2. Are recent and prospective investments in new revenue-generating enterprises cost effective? Do our analysis protocols ascertain short-term and long-term costs (including development and opportunity costs) as accurately as they ascertain possible short-term and long-term revenues?
3. Can ideas for new revenue generation be garnered from environmental scanning of the activities of other institutions and organizations and of the institution's economic, social, political, and technological contexts? How might an aggressive analysis of the external environment be organized?
4. What expertise do faculty have (e.g., environmental scanning, technical knowledge) that might aid in assessing existing and prospective revenue-generating initiatives?
5. Are existing assets of various kinds on campus capable of producing more revenue?
6. Which liquid or semi-liquid assets are available for investment in new revenue-generating activities?
7. How does the performance of our endowment and short-term money market holdings compare to that of comparable institutions?
8. Are there barriers to entry into some promising areas for revenue generation, and are there ways to act proactively now to overcome those barriers?

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### "Internal Operations Analysis"

1. How does the central administration currently support the pursuit of additional revenues by academic units and faculty? Could the process be made easier while still maintaining appropriate central controls? For example, do we have in place one or more competitive funding programs for faculty to pursue innovative ideas that may generate new revenues for the university? If so, is the program working, and how might it be refined? If not, how should such a program be organized?
2. What are the price sensitivities of our current and prospective undergraduate, graduate, professional, certificate, and nondegree students, both part-time and full-time? To what extent might tuitions and tuition schemes (e.g., forms of differentiated tuition) be changed to generate greater net revenues without sacrificing other core institutional goals of student quality and diversity?
3. In what ways are user fees now being employed on campus, across units and levels? Are we instituting and using these fees in appropriate ways, i.e., maximizing revenues while maintaining core academic commitments?
4. What is the cost-effectiveness of current or prospective investment in a patenting, licensing, or technology-transfer office on campus? Are front-end and ongoing costs currently being offset by revenues? What are the prospects for future financial viability?
5. Would instituting or further emphasizing responsibility-centered, incentives-based budgeting (which decentralizes some financial decision making to the unit level) help generate greater net revenue for the institution?
6. Are we accurately assessing potential risks and legal liabilities associated with existing and prospective revenue?
7. Are existing assets valued appropriately for purposes of sale or debt security?
8. What role will external consultants or specially designated staffers play in developing new initiatives?
9. What organizational mechanisms (e.g., teams, task forces, committees, new units) are being used and could be used to integrate the efforts of institutional staff and faculty involved in overseeing, designing, and implementing new revenue-generating activities?
10. Are revenue-generating initiatives being monitored to ensure their continuing, or at least promising, returns on investment?

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## Local Activities

### EXPLANATION

Feedback from viewers of our satellite teleconferences in recent years indicates that a highly effective way to increase the value of the teleconference is to make it an interactive experience with your colleagues. View the program with others, discuss the topics and issues with them, and evaluate the suggestions and insights from the panelists in light of the problems and opportunities at your college or university. Reading through the participant's print packet and the supplemental web site before viewing the broadcast will make the teleconference even more valuable. The following activities are provided to help you get started:

### DISCUSSION

Divide participants into smaller groups to discuss these issues and then report back to the group as a whole.

1. "The budget crisis requires that as college leaders we learn a new skill, that is, how to sell. ... If we hope not only to survive, but also to thrive during these difficult times, we must enhance the competitive position of our colleges through smarter marketing and selling our value and services. Yet few college presidents know how to sell and even fewer staff members have this skill. ... Each college should seriously consider contracting or employing an effective sales staff, and the president and selected staff should be trained in effective selling techniques. Presidential leadership programs should include a special session on sales and selling." P. Anthony Zeiss, "Weathering the Storm: Besieged by Funding Cuts, Community Colleges Must Get Creative" *Community College Journal* June/July 2002, Volume 72, No. 6.
  - Do you agree or disagree with Zeiss that college leaders need to become more entrepreneurial? Why?
  - What are some drawbacks of institutional leaders devoting a greater amount of their time to entrepreneurial endeavors? What are some of the potential benefits? Do the potential benefits outweigh the drawbacks?
  
2. Discuss the relative merits and liabilities of the following typical cost-savings efforts.
  - Reduce the incoming student body
    - Discontinue 'open door' policies
    - Raise admission requirements and standards
    - Raise performance standards for current students
    - Curtail recruitment efforts
  - Reduce services offered
    - Eliminate non-essential staff travel
    - Eliminate some course sections
    - Eliminate some courses altogether
    - Eliminate entire low-enrolling disciplines and departments altogether
    - Eliminate extracurricular activities
    - Reduce or eliminate course offerings between regular semesters or quarters
    - Limit library acquisitions
    - Limit instructional technology expenditures

- Downsize personnel
  - Reduce the number of adjuncts and other part-timers
  - Institute a hiring freeze
  - Trim the full-time workforce, including faculty
- Maximize efficiency and mobilize resources
  - Require faculty to teach larger sections
  - Request that all full-time faculty and appropriately degreed non-faculty teach an additional course section at no additional compensation
  - Go to a 4-day work week to save on utilities
  - Limit the number of campus buildings used during 'off' times, like summer
  - Partner with other institutions to share resources and financial burdens  
(offer one section of a low-enrolling course to students at several or more institutions, develop distance education courseware in concert with other institutions, etc.)

What other cost-saving measures has your institution employed, and what are the pros- and cons- with each of those?

3. Brainstorm on the following topics specifically as they relate to your institution:

- Increasing revenue from current sources
  - Other than federal, state, and tuition-related income, what money-making goods and services does your institution provide to the community (corporate training, patented products, rental of facilities, expert consulting, etc.)?
  - What potential additional local markets exist for the goods and services you're already providing?
  - Are your products and services competitively priced and of equal or superior quality to those of your rivals?
- Discovering and developing new revenue sources
  - What products and/or services is your institution uniquely qualified to provide to markets outside your own campus? (What do you do well; what are you known for?)
  - What resources does your institution have that are currently underutilized (land, classroom-performance hall-lecture hall space, faculty expertise, etc.)  
What local markets might exist for those resources?
  - What teaching/learning products have faculty created and are utilizing in their individual classrooms that might have a value in the larger educational market?
  - What specific needs or deficiencies are present in the communities that surround your institution?  
How might your institution address these needs without substantial additional capital outlay?
  - What businesses are present in your community that you might partner with to your mutual benefit?
  - What incentive program, if any, exists for faculty and staff who have cost-saving or revenue-producing ideas? If no such program exists, what would an incentive program need to be effective at your institution?

Dallas Teleconferences Web Site

<http://telelearning.dcccd.edu/prodsvcs/Teleconferences/default.htm>

"Creative Strategies in Tough Financial Times" Teleconference Web Site

<http://telelearning.dcccd.edu/2k32k4/toughtimes>

## Electronic Resources

AACC. "Local Community College Action Campaign: Combating State Budget Cuts to Community Colleges."

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## UPCOMING PROGRAMS

(All times are 1:30 - 3:00 PM CT unless indicated otherwise)

NOV. 11, 2003	THECB-CTC ANNUAL UPDATE (1:30 - 2:30 PM CT)
NOV. 13, 2003	TEACHING FOR STRATEGIC LEARNING
NOV. 20, 2003	A BROADER SENSE OF ARTICULATION
JAN. 29, 2004	EDUCATING THE "NETGEN": STRATEGIES THAT WORK
FEB. 20, 2004	THE VALUES OF TEACHING (1:00 - 2:15 PM CT)
FEB. 26, 2004	THE REAL COST OF ONLINE COURSES
MAR. 3, 2004	ANNUAL CARL D. PERKINS RFQ TELECONFERENCE
MAR. 25, 2004	COLLABORATIVE LEARNING TECHNIQUES (COLTS)
APR. 8, 2004	CYBER INSECURITY? PREVENTION AND PROTECTION SOLUTIONS

Programs to be streamed and available via the Internet include:

SEPTEMBER 2003	EXPANDING YOUR ENGLISH TEACHING SKILLS
OCTOBER 2003	LIGHTEN UP AND LIVE LONGER (WELLNESS)
NOVEMBER 2003	COPYRIGHT ISSUES ONLINE
DECEMBER 2003	INTERNET 2: A NEW RESOURCE FOR EDUCATION
JANUARY 2004	SMALL TEACHING CHANGE = BIG LEARNING GAINS
FEBRUARY 2004	COOPERATION, COMPASSION AND CIVILITY IN THE CLASSROOM
MARCH 2004	CHANGE YOUR MIND AND CHANGE YOUR LIFE (WELLNESS)
APRIL 2004	CRITICAL THINKING: REQUIRED LEARNING FOR THE 21ST CENTURY
MAY 2004	CHEATING AND PLAGIARISM USING THE INTERNET
JUNE 2004	ETHICAL DECISION MAKING IN THE PROFESSIONAL SETTING --a special three hour in-service program for professional counselors and healthcare providers
JULY 2004	DOES YOUR ONLINE COURSE NEED EXTRA CREDIT TO PASS?
AUGUST 2004	RETIREMENT PLANNING FOR EDUCATIONAL EMPLOYEES

# VIDEOCONFERENCE TAPE ORDER FORM



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**Videoconference Tape Fee:**

**\$18 STARLINK Members**

**\$36 Non-Members w/ License**

**A tape of the videoconference will be shipped within 30 days  
after receipt of the completed order.**

***Please return this completed agreement to:***

**STARLINK  
LeCroy Center for Educational Telecommunications  
9596 Walnut Street  
Dallas, TX 75243-2112  
Phone: (972) 669-6505 FAX (972) 669-6699**

# Videoconference Evaluation Form

## EVALUATE “CREATIVE STRATEGIES FOR TOUGH...”

On a scale of 1-5, with 5 being the highest, rate the videoconference in terms of its value to you.

	Excellent			Poor	
Timeliness of topic	5	4	3	2	1
Objectives clearly stated and supported with effective program elements (discussions, videos, interviews, demos, etc.)	5	4	3	2	1
Moderator	5	4	3	2	1
Panelists or Instructor	5	4	3	2	1
Handouts	5	4	3	2	1
Technical quality	5	4	3	2	1
Overall evaluation of program	5	4	3	2	1

Local site activities were held? \_\_\_\_\_YES \_\_\_\_\_NO

1. Institution name: \_\_\_\_\_

2. My current position is: (circle one)

a. Board Member

d. Classified Staff

b. Faculty

e. Other \_\_\_\_\_

c. Administrator/Professional Staff

3. What did you like most about the videoconference?

4. What could have been done to make it more valuable to you?

5. What topics would you like to see addressed in future videoconferences?

Return to: STARLINK, 9596 Walnut St., Dallas, TX 75243.