UCD and UCHSC Consolidation Study

Presentation to the Faculty Assembly

January 27, 2003
Agenda

- **Overview of Process**
  - Participants’ Roles
  - Structure
  - Timeline
  - 5 Key Questions

- **Next Steps**
Overview of the Process

• The Consolidation Feasibility Study process will engage multiple stakeholders from both the Denver and Health Sciences campuses.

• The process will run from November 2003 through April 2004.

• The process will conclude with a report to the University System President.

• Details on the timeline and group structures are presented on the following pages.
Process Guidelines

The process for studying the feasibility of consolidating the University of Colorado at Denver and University of Colorado Health Sciences Center will proceed using the following as guidelines in evaluating feasibility of consolidation:

- The consolidation will be in the best interests of faculty, students, and staff of the University of Colorado.
- The consolidation will create a great urban research university.
- The consolidation will directly benefit the community, the state, and the nation.
Feasibility Study Organizational Structure

Feasibility Study Teams
- Faculty Affairs
- Student Affairs and Services
- Library, Academic Outreach, & Facilities
- Diversity

Feasibility Study Teams
- Budget, Finance, and Institutional Research
- Information Technology
- Human Resources
- Facilities Services

Feasibility Study Teams
- New Programs / Opportunities / Synergies
- Sponsored Project Administration
- Compliance
- Commercialization

Decision / Next Steps

Regents

President

Steering Committee

UCHSC Dean’s Council

UCD Dean’s Council

Public Forums

Recommendations

Academic & Student Affairs Study Group

Administration & Finance Study Group

Research Study Group

Feasibility / Assessment

President’s Exec. Committee

Focus Groups and Other Input

UCD Dean's Council

UCHSC Dean's Council

Steering Committee
Five Questions Posed to the Feasibility Study Teams

1. Are there any obstacles to consolidation that cannot be overcome?

2. Is it feasible to combine operational areas of the campuses and if so, what would you recommend in the short, intermediate and long run?

3. Is it feasible to move to a common set of policies and operational philosophies and if so, what would you recommend in the short, intermediate and long run?

4. What is the team’s assessment of the impacts and opportunities of the consolidation on the other CU campuses?

5. Do you have recommendations, issues, and concerns that the feasibility study team would like to communicate to an implementation working group should the consolidation move forward?
**Timeline**

- **Kick off meetings**
- **Identify Team members**
- **Identify issues**
- **Develop Workplans**

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**Consolidation Feasibility Study Teams Meet & Work**

- **Nov 1**
  - Steering Committee Meeting
- **Dec 1**
  - Study Group Meetings
  - Study Group Meetings
- **Jan 1**
  - Study Group Meetings
  - Study Group Meetings
  - Study Group Meetings
- **Feb 1**
  - Study Group Meetings
  - Study Group Meetings
- **Mar 1**
  - Study Group Meetings
- **Apr 1**
  - Study Group Meetings
- **Apr 15**
  - Study Group Meetings

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- **Teams' Answers to the 5 Questions**
- **Final Team Reports Due**
- **Group Reports to Steering Committee***
- **Report to the President**

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- **Mar 19**

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- Additional meetings to be scheduled include campus forums, discussions with faculty and student assemblies and staff councils.
- Timeline events relate to Academic and Student Affairs and Business and Finance Study Groups. The Research Consolidation Study Group meetings have not yet been scheduled. It is anticipated that this group will submit a preliminary report on March 15 with a focus on major issues related to feasibility.
PwC’s Role

• Consultants:
  • PricewaterhouseCoopers has been engaged to provide support to the feasibility work groups in gathering and analyzing data and identifying opportunities to leverage and assess risk factors.
  • PwC will further provide industry expertise, benchmarking information, and guidance.
  • PwC will develop an independent assessment report on the feasibility of consolidation.
Overview: Benchmarking

• Benchmarking against “peer” institutions, as well as other institutions of interest:
  • PwC has sought to identify institutions that can provide insight into a consolidation transaction and subsequent operations.

• Three types of institutions are being profiled:
  • Aspirational peers
  • Institutions formed through consolidations
  • Other institutions of interest.
Overview: Aspirational Peers

- Aspirational peers profiled to provide insight on operations and management of a consolidated institution.
  - Urban health sciences center
  - With a strong undergraduate / graduate campus
  - State institutions
  - Ranked similarly or above UCD and UCHSC
  - With some geographic separation between campuses
Overview: Consolidation Peers and Others

- Institutions formed through Consolidations
  - Urban health sciences center, with a undergraduate / graduate campus, formed through a consolidation transaction.

- Other institutions with actual, contemplated or potential restructurings / mergers / consolidations.

- Institutions that decided against consolidation, yet are positioned similarly to UCD and UCHSC.
Peers Identified and Researched

Aspirational Peers:
• University of California, San Diego (UCSD)
• University of Alabama, Birmingham (UAB)

Formed through Consolidation:
• University of Illinois, Chicago (UIC)
• University of Alabama, Birmingham (UAB)

Other Institutions:
• University of Maryland, Baltimore (Health Sciences Center) (UMB) and University of Maryland, Baltimore County (UMBC) campuses.
• Indiana University Purdue University Indianapolis (IUPUI).
• Rutgers University / UMDNJ.
Peer Input

• Study participants and others have requested the opportunity to have direct communication with representatives of peer institutions, particularly:
  • University of California, San Diego
  • University of Alabama, Birmingham
  • University of Illinois, Chicago

• Recommendation: “virtual site visits,” utilizing video conferencing
  • Advantages:
    • Provides for maximum involvement opportunities for CU constituents
    • Reduces scheduling difficulties in short timeframe
    • Reduces burden on host institutions
    • Reduces cost

• These meetings will be scheduled quickly, targeted for late February or early March.
Questions and Discussion