



Wisconsin Higher Education Business Roundtable Executive Summary of July 11, 2006 Meeting

I. Meeting Logistics and Format

The first meeting of the Wisconsin Higher Education Business Roundtable (Roundtable) took place on Tuesday, July 11, 2006 in Madison, Wisconsin at the Madison Club. The meeting convened at 8:45 a.m. and adjourned at 4:00 p.m.

In attendance at the meeting were three of the four Directors, 13 of 23 Mentors, nine of 14 Chancellors, three UW Regents, UW System President Reilly and Deputy Don Mash, Advisors Michael Theo and Jim Wood, and guests Tom Fletemeyer, Bob Hanle, Kate Blavat (representing Director Michael Youngman of Northwestern Mutual), Fred Mohs, Doug Bradley and Louis Maier III.

The meeting was divided into two main sessions, one focused on the UW's management structure, challenges and opportunities and the other devoted to an examination of the UW's role in economic development. Each session contained four segments, including: 1) an orientation presentation by Kevin Reilly and UW Chancellors; 2) a panel response session featuring comments from five or six Directors, Mentors and Advisors; 3) a discussion open to all participants; and 4) a discussion about what next steps might make sense for the Roundtable.

The meeting was videotaped and will be made available to Directors and Mentors at the Roundtable web site.

The meeting was preceded by a Roundtable Board of Directors meeting at which José Delgado was elected president of the board and Mark O'Connell was elected vice-president and secretary/treasurer.

II. Session Focus and Next Steps

A. UW Management

1. President Reilly made clear that he and the Chancellors understand that there is room for improvement in System management and indicated that they were very interested in advice and counsel from the Roundtable and the Wisconsin business community regarding how the UW System can use its resources more effectively and improve its management.

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On the other hand, President Reilly and the UW Chancellors wanted the Roundtable to know that significant efforts have already been made and that the System has addressed many of the personnel management and policy issues that were raised over the past few years. He also made the point that they are delivering the “product” (i.e., education, research, community service) despite difficult circumstances.

Directors, Mentors and Advisors, while attentive to President Reilly’s comments, raised questions about: 1) the interplay between shared governance and effective, efficient management of the System; 2) whether the UW System was actually a system or a confederation; and on a related note 3) whether or not the System was managing to clearly defined goals and messages.

2. UW System executives and Chancellors believe that their ability to manage as cost effectively as they could is severely hampered by requirements that many purchasing and management decisions must be driven through the Wisconsin Department of Administration (DOA).

Mentors, Directors and Advisors were sympathetic to the UW argument, but did not feel well-informed enough to reach any judgments on this issue.

3. There was universal agreement that the UW was not getting its story out and that it needed to significantly improve its legislative relations. On this note, there was also a fair amount of agreement that the UW System should rely heavily on the local campuses for help in both areas.

B. *UW Management Next Steps* – There was general agreement that the Roundtable should consider pursuing some sort of action in all three of the above areas—i.e., further research into whether or not the UW System management structure provides UW executives and Chancellors with the tools they need to manage in this challenging time, a closer look at how DOA requirements affect UW costs and efficiency, and an examination of what might help the UW System and campuses communicate more effectively and improve their relationship with the Legislature.

C. *UW Management Recommendations*

1. Roundtable Advisors recommend that the Roundtable work with President Reilly to gather more information regarding issues of structure, management and flexibility raised at the meeting and to identify individuals and organizations that might provide expertise regarding those issues.
2. Roundtable Advisors recommend that the Roundtable delegate the Advisors to assist UW System management to identify and appropriately address the System’s external affairs challenges and opportunities. The Advisors would recommend that the Roundtable solicit additional funding to support this effort.

D. *UW Role in Economic Development Conclusions*

1. There was unanimous agreement amongst all participants that the three campus local economic development involvements shared with the Roundtable (i.e., UW–Stout, UW–Oshkosh, and UW–Milwaukee) revealed both significant, meaningful engagements and outstanding campus leadership.
2. Chancellors indicated that they believed that the UW System was both encouraging and supportive of their efforts and also provided periodic opportunities to share their experiences and findings with other Chancellors.
3. Once again, there was agreement that neither the campuses, nor the UW System have succeeded in getting these very positive stories the attention they deserve.

E. *UW Role in Economic Development Next Steps* – Aside from agreeing that the UW System and its campuses needed to do more to tell their stories and appearing to agree that some effort should be made to explore how better to share and transport local experiences, the participants did not rally around a clear set of next steps.

F. *UW Role in Economic Development Recommendations*

1. The Roundtable Advisors recommend that the Roundtable encourage the Advisors to examine how to improve public understanding of the local economic development role being played by the campuses as a part of their assisting UW System management identify and appropriately address the System's external affairs challenges and opportunities.
2. The Advisors would also recommend that the Roundtable encourage President Reilly to ask those Chancellors who have led and are now participating in economic development initiatives to lead a one day retreat dedicated to the specific question of what the System, the campuses and the Roundtable could do to: 1) further encourage and assist such efforts; 2) share their experiences with others; and 3) help make sure that their experiences contribute to the ongoing search for public policy initiatives and fiscal support that might improve Wisconsin's economic development efforts.

The Advisors would recommend that the Roundtable delegate the Advisors to assist the UW System and the Chancellors to organize and convene this retreat and that the Roundtable solicit additional funds to support the effort.

III. Next Roundtable Meeting

The Roundtable will convene again in early November 2006. Roundtable President José Delgado has generously offered to host the meeting at American Transmission Company's corporate headquarters in Pewaukee. The two main topics will be Access to the UW System and the current health of the Wisconsin Idea.

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There will also be reports on the progress made on the next steps referenced above.

In addition, a representative of the American Council on Education will share the organization's latest national survey findings on public perceptions of higher education and its importance to America's ability to compete on a global scale. Carl Gulbrandsen, managing director of the Wisconsin Alumni Research Foundation, will share his thoughts on transferring ideas from the laboratory to the marketplace.