

GENERAL ALUMNI ASSOCIATION TASK FORCE REPORT

The following Task Force Report was unanimously adopted by the Association's Board of Directors at their board meeting, Saturday, January 28, 1989. For those wishing to contact Task Force Chairman and GAA President-Elect Tom Lambeth, he may be reached at (919) 725-7541.

Introduction

Recognizing that many changes have occurred recently in the life of the University, General Alumni Association President and North Carolina Chief Justice James G. Exum, Jr. '57 appointed an alumni Task Force last year to review current internal and external information regarding the University and meet with leaders of the public higher education community. The objective of the Task Force has been to identify areas of significant concern to Carolina alumni and possible opportunities for the General Alumni Association to play an appropriate role in responding to the challenge of these concerns. Our goal was the formulation of an agenda for the Association in its independent support of the University, consistent with the good of the state and its higher education system.

The Task Force was composed of two former chairmen of the University's Board of Trustees, the Chief Justice of North Carolina, three former GAA presidents and six present officers and directors of the Association. The Task Force met by itself and with a number of leaders of the campus and of public higher education in the State. Ours has not been an inquiry or an investigation. Rather it has been a continuing conversation with individuals expert in their knowledge of the University and of higher education and committed

to the preservation of this campus and of educational opportunity in North Carolina. We wanted these conversations to be as candid as possible, and in return for that candor we promised our visitors total confidentiality.

The opportunity to meet with distinguished leaders in the higher education community has been a rare and valued opportunity for the Task Force. It has been an education that we hope we can share in some measure through this report.

While two related events helped prompt the appointment of the Task Force — publication of the Fisher Report and the election of a new Chancellor — it is important to note that the group was not preoccupied with either of these two events. It is equally important to note that this report does not grow out of despair about the state of the campus — the Task Force believes the University to be strong and vital. We further emphasize that any interpretations of personal criticism directed at present or former officials would conflict with the Task Force's mandate and its intentions.

While not preoccupied with responding to the Fisher Report, the Task Force believes it important to acknowledge the valuable contribution of that document. We commend Chairman Eubanks and the Trustees for their initiative in undertaking such a review. Periodic review of an institution is important. The vitality of such an institution as the University is assured by such introspection and by sound long-range planning.

This report and its observations are directed specifically to the General Alumni Association, its Board of Directors and its more than 50,000 dues-paying members.

Independent of the University, the Association has no authority (and seeks none) to impose any changes upon the General Administration, the Board of Governors, the Board of Trustees or the administration at Chapel Hill.

Finally, and most importantly, rather than provoking controversy, the Task Force has attempted to identify areas of consensus where alumni advocacy and support is believed important. The Association seeks to work cooperatively with all who wish to maintain and strengthen the excellence which is a fact of history at Chapel Hill. In every sense we see two hundred years of the first state University as prologue.

The Association

Our work has reinforced for each of us the importance of maintaining the Association as an independent organization which belongs to its membership and which is free within the restraints of resources and good sense to advocate for the University without restriction. We are keenly aware of the expanding role of the Association as more than a fundraising affiliate, as more than university booster — although both are valid activities worthy of preserving. We are grateful to campus leadership for their recognition of the Association as a proponent of educational excellence as well as institutional loyalty. We especially appreciate Chancellor Hardin's appointment of the GAA Executive Director to the Administrative Council and his reaffirmation of the Association's independent role in the life of the University. The Association represents a considerable force in the growth in numbers of members — now exceeding

50,000 individuals and potentially several times that number. To abuse that power would be reprehensible. To fail to use it constructively would be foolish. We believe that the more aggressive pursuit of an Association agenda in the coming decades is clearly in the best interest of the University.

Governance

North Carolina's system of public higher education has now operated more than fifteen years in its present structure. At such a time it is appropriate for the University community and the state at large to examine that structure. The system belongs to the people; it exists to serve their needs; its accountability to those who have created it and who fund it is best assured by periodic examination. We regret that the suggestion of such examination is often equated with a movement for secession from the system. The Task Force would oppose any such movement. We support the system. We believe it serves the interest of all North

Carolinians. Any review should focus on how to improve that structure without jeopardizing the strengths of any constituent of the University System.

We believe that many of the issues of public higher education are better understood when we examine the difference between the University System and the constituent universities. The System is not a University. It has no faculty; it has no students; it awards no degrees. It is a coordinating agency and it is a sound one which has strengths unique to such institutions.

Most of the suggestions for change which we would endorse involve the achievement of greater flexibility. National studies reveal that the North Carolina University System is next to the bottom in such flexibility. Such rigidity of regulation and policy is especially worrisome at institutions which by their very nature prosper most when there is free exchange of ideas, when creativity and initiative are encouraged, when the

pursuit of innovative management is rewarded and when there is a minimum of bureaucratic restraint. Our review convinced us that such flexibility can be achieved without reducing accountability; indeed some proposed changes might achieve greater accountability.

We believe the close proximity of the office of the general administration of the University System and of the campus at Chapel Hill creates potential problems. We believe that it is of critical importance in such a relationship that we reinforce both in perception and reality the role of the Chancellor as the chief executive officer of the constituent institution. We found agreement on this point among those with whom we met.

We believe efforts should continue to strengthen the role of Trustees at all constituent institutions in policy development and in other matters. We found little argument with the proposition that the delegation of additional authority to the Trustees can be accomplished without reducing the

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statutory authority of the Board of Governors and the President of the System.

Finally, we believe it is important that the GAA and its leadership become more involved in the election of the members of both the Board of Governors and the election and appointment of members of the Board of Trustees.

Financial Resources

The Task Force found in its review a consensus that present regulatory practices often result in disincentives to the best in fiscal management. While they may be appropriate for many state agencies, they work less well at educational institutions and especially at major research institutions such as the University. We believe, again, that there are ways to insure accountability while achieving greater fiscal flexibility. For example: rigid line item budgeting makes impossible the effective use of limited resources in a timely basis and the requirement that unspent funds revert (which amounts to an annual loss of as much as \$16 million at Chapel Hill) discourages the wisest use of tax funds, discourages local initiatives to reward good management and encourages spending rather than saving. It seems only good sense that university budgets should be on a program basis.

The campus has benefited from the generosity of the people of North Carolina, expressed through the General Assembly, and the people have received a rich dividend from their investment. This campus generates nearly \$2 in other revenue for every \$1 received in state appropriations. The present formula for treatment of overhead receipts (which allows the University to retain only 65 percent of the overhead receipts) clearly works to discourage aggressive pursuit of outside funds. We note with interest the approach of South Carolina, which not only allows its higher education institutions to retain all overhead receipts but actually rewards their success with an additional 25 percent from state appropriations.

Another example of regulation

which seems counterproductive to a major research university such as ours is the present \$5000 threshold for equipment purchases which do not require state agency approval. Consideration should be given to increasing that level to \$25,000. Similarly, we believe consideration should be given to flexibility in personnel classification since few teaching and research positions can be equated with positions of other state employees.

We note and applaud the efforts of chancellors in recent years to strengthen and expand private financial support of the University. However, we would caution against any overemphasis on private funding as the salvation of the institution. It can provide the margin of excellence but only the margin. Continued strong public support and research funding will provide the major source of our finances for the foreseeable future. For example: a \$200 million endowment provides essentially the same annual income as a 10 percent increase in research funding — a level of research funding currently being met by the University. We should continue to place our emphasis on maintaining and enhancing state and federal funding.

Admissions

In the 1970s, the Trustees wisely froze the size of the student body. Since applications for admission have continued to grow dramatically, admissions continue to be a challenge. We commend the thorough and thoughtful report of the Board of Visitors Task Force on Admissions and encourage the implementation of its recommendations. Specifically, we believe it is important that adequate resources be provided to assure the sensitive and thorough processing of each application for admission.

Name

For almost a century and a half, the name "University of North Carolina" was understood to mean the institution located at Chapel Hill — the first state university in America. In recent years restructuring has confused the meaning of that name. We believe that at some

point in the future, it is advisable and will be possible to remove that confusion without jeopardizing the identity of the University System or any of its constituent institutions. For the moment, we see no reason why the General Alumni Association should further this confusion by use of the words "at Chapel Hill" in reference to the University which it serves.

Faculty and the AAU

Education is the mission for which the University at Chapel Hill was created; the faculty is both the preserving and renewing force in the pursuit of that mission. The University will not maintain excellence as an institution unless it maintains and pursues excellence in its faculty. To attract and retain such a faculty in what is an increasingly competitive environment will require increases in salaries, in benefits, in carefully developed partnerships with private industry and in a better, more generous sabbatical policy. We must remember always that the University's competition is national rather than regional. This is just as true in the case of senior administrative personnel. We urge the University to explore creative initiatives such as those suggested by the Board of Visitors for attracting and retaining faculty, and we applaud the efforts recently undertaken by the President and the Board of Governors to strengthen support of faculty at Chapel Hill. To put at risk a two century investment in excellence by the people of North Carolina would constitute gross negligence.

For decades, a measure of excellence in higher education has been invitation to membership in the Association of American Universities. This University was elected to AAU membership in 1918. It is the only public institution in North Carolina ever to achieve that honor. Yet, our Chancellor does not represent our faculty at the meetings of the Association. This issue was discussed with every person who met with the Task Force. We were struck by the lack of any uniform, cohesive justification for this practice

and no issue raised in our conversations with leaders in the public higher education community produced more diverse interpretations of historical facts, AAU policies and rules and judgement as to the importance of the issue. The Task Force finds no reason either in the rules, practices or policies of the Association or in the statutes governing public higher education in North Carolina which would prevent the future attendance of the Chancellor with the President of the System.

Finally

Universities are established for similar purposes in dissimilar circumstances. The University of North Carolina established in Chapel Hill in 1789 shares with all universities a common commitment to the pursuit of truth. It has an uncommon commitment to the people who established it. We believe that all those issues which affect the Chapel Hill campus should be decided on the basis of what is best for the people of North Carolina. We believe we can achieve our ambitions for the University on that basis. It is to the pursuit of these purposes that we call our fellow alumni to an effort more ambitious and more vigorous and lasting than we have known before. The sound we hark is the greater glory of the University for the greater service of North Carolina.

Respectfully submitted,

Thomas W. Lambeth, Chairman

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