

July 27, 2009

The Economic Environment Working Group (EEG), the campus task force charged with formulating possible responses to the adverse economic climate, has nearly completed the first phase of our work. We have met with over 20 different groups of faculty, staff and students in a variety of formats (see **Attachment 1**). These meetings included sessions open to all faculty and staff, meetings with academic division departments and program chairs, meetings with groups representing administrative divisions, and sessions with student representatives. We have also met with campus governance committees, including Budget Committee and the Advisory and Planning Committee, and engaged with the Board of Trustees in a session held during their most recent meeting.

Members of the campus community have also advanced ideas and suggestions to individual members of the EEG and, in addition, we have over 30 submissions from individuals using the EEG website questionnaire (<http://www.colgate.edu/eeg>). In general, these comments and suggestions are very much in agreement with the issues raised in our group sessions. We thank everyone who has participated in meetings or submitted suggestions and encourage everyone to continue to use the website; we continue to actively seek good ideas.

Since we are nearing the end of our consultative phase, we want to share with the community some of the recurring themes that have been raised in these meetings. In all of our meetings we have been reminded of the importance of maintaining Colgate's commitment to our core mission as a leading liberal arts institution, and to protect the strides that have been made that enhance the academic quality of the university. At the same time, the groups with whom we have met have made numerous suggestions that may bring about cost-savings and revenue enhancement, and these are ideas that the EEG will be studying carefully. The ideas can be categorized into three general headings: 1) scope of operations; 2) opportunities for efficiencies; and 3) revenue generation. Within the categories, issues that have been regularly brought forward include the following:

Scope of Operations:

- Events and programming: The prevailing viewpoint is that Colgate offers too many events which compete for the time and interest of students, faculty and staff. A reduction in the number of events at which food is served, and more uniform policies regarding food and beverage service at meetings, were advanced as suggestions.
- Intercollegiate athletics: Many have asked if Colgate's intercollegiate athletic program is too ambitious for our size and mission.
- Recent initiatives: While many groups noted the importance of moving forward within the context of Colgate's strategic plan, the cost and benefit of newer Institutes and Centers, and Colgate's extensive study group programs, were raised by some as areas of concern. We also heard that some new initiatives may contribute to the culture of overextension on our campus through additional activities that place demands on the time of students, faculty and staff.
- Growth in number of employees: The EEG was encouraged to study the growth in personnel, both staff and faculty, and its connection to current and future goals and programs.

- **Benefits:** While appreciating that Colgate's benefit package is important for attracting and retaining employees, some faculty and staff asked if the current program provides the right mix of support, and how it compares to our institutional peers.

Opportunities for Efficiencies

- **Energy and resource conservation:** Questions were often raised regarding the need to light buildings during late evening and nighttime hours, the use of more efficient temperature controls for buildings, and the energy consumed by the campus vehicle fleet, for example. Some suggested that we need to explore more fully the opportunities for Colgate to develop its own energy resources, such as wind, natural gas and wood biomass. The overuse of paper via printing of brochures, newsletters and announcements was observed, particularly given the availability of electronic forms of distribution.
- **Overall operational efficiency:** We have often heard that Colgate is known as an institution that does more with less, and many groups noted that we need to reaffirm our commitment to overall efficiency to ensure careful use of our financial resources.
- **Spending/budget policies:** A number of groups, including students, raised questions about Colgate's end-of-year budget policies which may encourage a 'use it or lose it' mentality. We should note that for the fiscal year ended May 31, 2009, many departments curtailed perhaps unnecessary year-end spending, which was quite beneficial to Colgate's operating budget.

Revenue Generation

- A common suggestion to raise additional revenue was to modestly increase the number of students, although many noted that there were potential costs that would need to be considered as well. Increasing the use of the campus in the summer with additional revenue-producing programs, and consideration of alternative academic calendar structures, were also mentioned.

The list above is necessarily incomplete; other good ideas and suggestions for further analysis were brought forward and will be assessed by the EEG as we continue our work over the summer and early fall. We will meet with certain budget managers in the next phase of our task, and gather and analyze the information needed to assess various cost containment and revenue options. Since our timeline requires that we have initial scenarios available for discussion with President Roelofs and the Board of Trustees by mid-October, 2009, we will need to consult widely with the community, particularly with key campus governance groups, in early fall. In accordance with its Charge, the EEG plans to provide a set of budget restructuring options in January 2010.

EEG Working Group Members:

Bruce Selleck (Co-Chair)

David Hale (Co-Chair)

Jill Harsin

Constance Harsh

Nicole Simpson

Charlotte Johnson

Kim Waldron

Bob Tyburski

Hugh Bradford

Trish St. Leger

Meetings of the EEG with Colgate Community

Advisory & Planning Committee	April 14, 2009
Social Science Department Chairs	April 28, 2009
Humanities Department Chairs	April 28, 2009
Open Meeting for Students	April 28, 2009
Natural Sciences Department Chairs	April 30, 2009
On-Campus Budget Committee	May 5, 2009
Open Meeting for Assistant Professors	May 6, 2009
Open Meeting for Tenured Professors	May 6, 2009
University Studies Chairs and Program Directors	May 7, 2009
Division of Finance and Administration Staff	May 27, 2009
Physical Education, Recreation & Athletics Staff	May 28, 2009
PR/Communications Staff	June 8, 2009
Dean of the Faculty Staff (academic)	June 9, 2009
Board of Trustees	June 13, 2009
Advancement Staff	June 18, 2009
Dean of the Faculty Staff (academic support)	June 18, 2009
Admissions Staff	June 19, 2009
Open Meeting for Staff	June 23, 2009
Dean of the College Staff	June 23, 2009
SGA President and Vice President	July 2, 2009
Alumni Affairs Staff	July 6, 2009
Open Meeting for Students	July 16, 2009