

**Comprehensive Evaluation
of
Bruce D. Benson, President
University of Colorado

for the period 2008-2013**

**Prepared by Cynthia H. Pepper
Principal, Pepper Consulting Group**

**on behalf of the
University of Colorado Board of Regents**

The background of the page features a large, faint watermark of the University of Colorado seal. The seal is circular and contains the text "UNIVERSITY OF COLORADO" around the perimeter and "1876" at the bottom. In the center, there is a figure holding a torch and a book, with the word "AMITY" above it.

**Michael Carrigan, Chair
Sue Sharkey, Vice Chair
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June 2014

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SUMMARY OF COMPREHENSIVE EVALUATION
of Bruce D. Benson, President,
University of Colorado for the Period 2008-2013

The University of Colorado (CU) completed a five-year comprehensive performance evaluation of its president, Bruce D. Benson, for the period 2008-2013. The evaluation is in accordance with Regent Laws and Policies, specifically Policy 3: Officers and Exempt Professionals, an excerpt of which states:

An assessment of the officer's fulfillment of long-term responsibilities over the comprehensive evaluation period shall include consultation with appropriate individuals from inside and outside...the university and consideration of the resources and other support needed to fulfill responsibilities. The officer under review shall provide a statement of accomplishments, self-evaluation, and long-term objectives. Upon completion of the comprehensive evaluation, the supervising authority shall make any necessary changes to the officer's position description, in accordance with university policies.

Due to the nature of the evaluation, the CU Board of Regents engaged an outside firm specializing in human resources consulting within institutions of higher education, Pepper Consulting Group, to receive and compile the confidential input and prepare the report.

Seventy-one respondents representing all CU stakeholder groups provided input to the comprehensive evaluation of President Benson. The overall assessment provided by the respondents is highly favorable.

Examples of significant achievements that have occurred during President Benson's term of service include:

- President Benson has elevated the reputation of the University of Colorado.
- He has effectively balanced the autonomy of the individual campuses with the collective value of the university as a system.
- CU has implemented broad outreach efforts, including social media outlets, and has expanded its constituent communication list from 80,000 to 382,000.
- President Benson has improved the institutional culture of collaboration and coordination.
- CU secured legislation in five consecutive legislative sessions that allows the university to generate new revenue, operate more efficiently, institute better business practices, achieve savings, and expand its base of international students.
- A clear focus on institutional efficiencies has eliminated redundancies, led to streamlined processes and reduced red tape.
- President Benson has provided leadership over the finances of the university and steered CU through challenging economic times and steep funding declines while diversifying revenue streams.
- CU administration adopted a variety of cost-savings measures that total millions, including self-funding employee medical plans reducing banking costs, gaining funding through more favorable bond ratings, relocating and consolidating administrative functions, and changing its travel procedures and vendors.

- CU set records in research funding during President Benson's tenure.
- A successful branding project enhanced the university's visual identity by reducing more than 400 disparate logos to fewer than 10.
- CU engaged partners to advance transportation projects crucial to the campuses.
- President Benson has honored CU's mission. The following significant accomplishments of the university were supported during his presidency:
 - Boulder and Denver | Anschutz campuses' 10-year reaccreditation
 - Groundbreaking research and new research partnerships in such areas as Alzheimer's disease and precision medicine
 - MAVEN launch, the mission to Mars developed and implemented by CU-Boulder faculty researchers
 - A new business school building in Denver with unique features like the J.P. Morgan Center for Commodities
 - A new biotech building on the Boulder campus
 - The recently-opened Lane Center for Academic Health Sciences in Colorado Springs to serve the community and foster research as centerpiece of the city's urban renewal plan
 - A contract with Coursera, a leading massive open online course (MOOC) platform, to offer MOOCs to students around the world
 - Donor, research and alumni engagement opportunity growth due to changes in the Boulder athletic program and the shift from the Big 12 to the Pac 12

President Benson's commitment to CU, extensive personal and professional network, and the respect of the community members and business and government leaders are seen as significant contributors to his success. He is considered a man of integrity with a direct approach to solving problems. The path of the presidency, consequently, has not always been smooth. Like many of his predecessors, President Benson has experienced periodic challenges with CU's publicly-elected Board of Regents; however, he continues to enjoy the support of the Board. He has learned, by many accounts, however, to adapt the style that was so successful as an entrepreneur and businessman to one effective in a culture of public-sector shared governance and collaboration. While some may not always agree with President Benson's decisions, they do agree that he always makes them with the best interests of CU in mind. As one evaluator summarized, "Clearly President Benson has done an outstanding job representing CU. Although there are many within the university-wide community that have served this institution with distinction, I do not know of anyone who has done so with more loyalty, enthusiasm and effectiveness."

What is next on the horizon to be ready for the future of Colorado higher education? The president and the regents agree that CU must accelerate university-wide strategic planning and leadership succession initiatives as university competition increases and retirements loom.

The following is a word cloud culled from the seventy-one responses. The Oxford Dictionary's definition of a word cloud is, "An image composed of words used in a particular

text or subject, in which the size of each word indicates its frequency or importance.” The most frequent word used by evaluators is ***Integrity***, a good summary of President Benson’s tenure for 2008-2013.

Overall, it is the conclusion of this report that President Benson has a long record of accomplishments, and CU is much better institution for his service.

PRAGMATIC EFFECTIVE
 AMBITIOUS TENACIOUS
PROTECTOR ACTION
 ENTHUSIASTIC CONSULTATION
GRUFF
GENEROUS COMPETITIVE
 SERVICE
SMART IRASCIBLE
 KIND STRONG
 URGENTLY SINCERE
STRAIGHTFORWARD
 STUBBORN KNOWLEDGE
INTegrity ROCK
 RESOURCEFUL HAND-HEADED
BUSINESSMAN FIGHTER
 WORK TOUGH
ENERGETIC COMPASSIONATE
SUCCESSFUL GOOD RESULTS-FOCUSED
IMPATIENT POLITICAL
 OVER-ACHIEVED
LOYAL NO-NONSENSE
EXTRAORDINARY FUNNY GENIUS
 STAR
VISIONARY CONTROLLING
WORKHORSE

**COMPREHENSIVE EVALUATION
of Bruce D. Benson, President,
University of Colorado for the Period 2008-2013**

PURPOSE

This document confirms the University of Colorado completed a five-year comprehensive evaluation of its president, Bruce D. Benson, for the period 2008-2013. The evaluation is in accordance with Regent Laws and Policies, specifically Policy 3: Officers and Exempt Professionals, an excerpt of which states:

An assessment of the officer's fulfillment of long-term responsibilities over the comprehensive evaluation period shall include consultation with appropriate individuals from inside and outside...the university and consideration of the resources and other support needed to fulfill responsibilities. The officer under review shall provide a statement of accomplishments, self-evaluation, and long-term objectives. Upon completion of the comprehensive evaluation, the supervising authority shall make any necessary changes to the officer's position description, in accordance with university policies.

PROCESS

A university is a complex organization. The president of such an institution serves primarily as a chief executive officer, with major internal and external roles. On the internal side, the president is responsible for guiding strategy, leading broad initiatives of the Board of Regents, making key decisions, and assuring that multiple stakeholder groups are engaged appropriately in the activities of the university. On the external side, the president has primary responsibility for serving as the most visible representative of the university to the citizens of Colorado and beyond, influencing legislation that creates a favorable environment for institutional and student success, fundraising, and working to achieve positive local, regional, and statewide economic impact.

Because the responsibilities are so broad and manifest in multiple ways, a 360° assessment was used to capture confidential input from each of the stakeholder groups. This 360° approach requires feedback from the Board of Regents, key governmental officials, the president's direct and indirect reports, colleagues who serve in similar roles at other universities, alumni and donors, and a broad group of others who work with or for the university. Due to the nature of the president's position and a desire to obtain an objective evaluation, the Board of Regents engaged an external consultant, Ms. Cynthia Pepper, Principal of Pepper Consulting Group, to administer the process and prepare the comprehensive evaluation.

The comprehensive assessment process and the participant list were crafted to solicit information from those who have experience with the president or whose work or personal lives have been affected by the performance of the president and his leadership of CU. Although President Benson had the ability to suggest participants,

others, including all or the Board of Regents, were also invited to suggest names. The process was designed to ensure that the participants would provide a broad range of opinions about President Benson, including both favorable and critical opinions. The stakeholder groups they represent are:

- Members of the Board of Regents
- Former regents
- Government officials
- Chancellors
- Vice presidents
- Other members of the University of Colorado community, including: faculty, administrators, academic leaders, student leaders
- Donors
- Community members

Each potential participant received a letter from Michael Carrigan, Chair, Board of Regents, requesting confidential feedback on the president's performance against the following competencies and responsibilities summarized from the president's job description and expectations of the board:

- Service to the university's Board of Regents by ensuring its laws, policies and directives are carried out;
- Visionary leadership, teamwork and promotion of excellence in a multi-campus environment;
- Engagement of campus groups around strategic priorities to deliver results;
- Support of academic program development and innovation;
- Decisive and judicious financial stewardship and fundraising success;
- Focus on diversity in all forms;
- Effectiveness in a shared governance and decision-making environment with faculty, staff and students;
- Engagement of the faculty to enhance the quality of teaching, scholarship and service; and
- Effectiveness working with the community, the state legislature and congressional delegations

The invitation letters were sent on March 7, 2014 with a participation deadline of April 4, 2014. Accommodations were made for those whose schedule required more flexibility. For those who wished to provide verbal comments rather than written statements, Ms. Pepper was available for phone conferences.

Seventy-one individuals representing all stakeholder groups responded to the request. This representative group provides a broad basis for assessing President Benson's performance.

EVALUATION CONSIDERATIONS

There are two important concepts to consider when evaluating any type of performance: **what** the person accomplished and **how** the person accomplished it. Simply compiling a list of complete goals does not provide an accurate picture of the person's performance. For example, a relentless drive toward achieving goals can result in severe collateral damage to relationships, culture, trust, and reputations. Consequently, in performing this assessment, the participants were asked not only about President Benson's specific achievements but also about the impact on people along the way.

The sheer volume of participants and the depth of their responses precludes inclusion of every comment. Clear themes, however, emerged and were repeated both within and across stakeholder groups. These themes, exemplified by direct quotations, are described in the following pages. Necessarily, there were some outlying opinions which were not shared by many participants and, therefore, are not specifically mentioned in this report.

Also, to ensure a candid dialogue, Ms. Pepper provided an assurance of anonymity for all participants. Respondents who wished to provide President Benson copies of their letters were permitted to do so, but all comments are without attribution in the report. All quoted content is verbatim from participants.

BACKGROUND

The University of Colorado (CU) is a public research university with multiple campuses serving Colorado, the nation, and the world through leadership in high-quality education and professional training, public service, advancing research and knowledge, and state-of-the-art health care. Each campus has a distinct role and mission as provided by Colorado law.

Bruce D. Benson was sworn in as the 22nd president of CU on March 10, 2008. He came to the university an accomplished man, with a long list of impressive credentials and a fully-formed personality, knowledge base, and style. It is without question that all of these came into play as President Benson stepped into yet another civic role with enormous impact on the university, the state of Colorado, its citizens, and the region.

Before becoming president, Bruce Benson was a committed and vocal Republican, including campaigning as a gubernatorial candidate, chairing the Colorado Republican Party, and playing significant roles in national party initiatives. To be sure, there was much interest and no small amount of concern as to the extent to which political partisanship might be displayed once he assumed the presidency of the largest university in Colorado. Now, five years later, those who had the deepest concerns have expressed their appreciation for Mr. Benson's understanding that partisanship would

stand in the way of progress. Comments such as, “Bruce has honored his commitment to be non-partisan,” and, “My concerns about his being too political never came to pass,” were brought forward in many responses. On the other hand, there was some indication of disappointment by a few who had hoped that a strong Republican would increase diversity of thought and counterbalance the liberal reputation of the university, particularly of the CU-Boulder campus.

Under the Laws of the Regents, the president serves as the chief academic officer of the university and is a member of the faculty. When President Benson assumed the presidency, some faculty expressed concern that his lack of a graduate degree would impede his ability to provide academic leadership. Time has demonstrated that this concern was largely unfounded. Although President Benson does not have advanced degrees, he has demonstrated good understanding of the academic processes and has sought guidance from experienced academic leaders. His business experience has given him keen insight into finance and business, and he has been able to apply his experience in a way that advanced CU’s interests during the recent economic downturn.

FINDINGS

The assessment of Benson’s presidency, as viewed from complex and diverse vantage points spanning the internal and external communities, is consistently favorable. To quote one participant, Mr. Benson’s presidency is “a wonderful match-up between the man and the moment.”

The drop in state funding at a time of student growth hint at some of the challenges CU faced over the past six years. Despite the significant achievements detailed below, the work has not been easy. At times, President Benson’s relationship with the Board of Regents has been strained. It was noted that President Benson’s “command management style and confidence in his decisions can rub people the wrong way, and created some public struggles with the Board of Regents, especially in early years working with the board. More recently, however, many Regents appreciated the efforts he has made to improve this relationship.” The results have been positive and, despite the occasional disagreement, the Board of Regents have been supportive of President Benson’s agenda and priorities.

KEY SUCCESSES

The following paragraphs identify areas where President Benson has achieved important success. He is the first to acknowledge the importance of collaborating and assuring the right people are at the table to achieve big goals, including the Board of Regents, CU leadership team, legislators, business leaders, community members, faculty, staff and students. Each discussion, below, begins with an italicized overview of the topic from President Benson’s self-evaluation (Attachment A) and is followed by a listing of specific achievements (expanded in Attachment B). Comments from participants add input about President Benson’s accomplishments.

1. **Reputation:** President Benson has elevated the image and burnished the reputation of the University of Colorado and increased public confidence in higher education.

“A few themes emerge as constants throughout our work. First and foremost, we focus on the university’s reputation as the bedrock for all we do. We promote the positive and address the negative. Outreach has been a continuous priority for us, from creating the 2,500-strong CU Advocates program and CU for Colorado, to establishing a social media presence, to our branding effort, to growing our constituent email list from 80,000 to 382,000. Additionally, we are embarking on a significant marketing program to raise our profile.” (Benson)

- After CU suffered negative fallout from high-profile public issues (football recruiting scandal, Ward Churchill episode) President Benson has led efforts to ensure the university's reputation is strong by addressing problems immediately. He has focused on building a culture of accountability.
- He worked with Boulder campus leadership on a sustained effort to prevent disruption to the academic environment and shut down the 4/20 event on the Boulder campus.
- CU engaged in a branding project that eliminated more than 400 confusing and competing visual identities previously used on campuses and with university affiliates. The cornerstone concept of the project is that CU is one university with four campuses. The visual representation of that concept is the interlocking CU as the university’s primary mark.
- CU established *CU for Colorado*, which highlights the services provided in more than 240 educational, health and community service outreach programs across the state, as well as the success of more than 400 CU-affiliated clinic sites.
- CU enhanced how it engages external constituents by creating an electronic communication program that increased the number of constituent email addresses in its master database from 80,000 to 382,000. Additionally, President Benson established a social media presence on Facebook and Twitter, a first for a CU president.
- The University of Colorado Hospital was named the top academic hospital in America for two consecutive years. Faculty physicians from the CU School of Medicine staff the hospital.

“Bruce Benson has elevated the reputation and image of all of the University of Colorado campuses from the reverberations of the scandals from prior years. Its reputation was tarnished. Bruce had the toughness to fight for the university system and the clout to win.” (Participant)

2. **Cooperation and Coordination:** President Benson has improved the institutional culture of cooperation and coordination through the legislative process, strategic partnerships and outreach.

“Another theme is our focus on engaging external partners. We have done so through public-private partnerships, affiliations with hospitals, development of the FRA [Fitzsimons Redevelopment Authority and] addressing transportation issues with RTD, Denver and surrounding communities.” (Benson)

- CU secured legislation in five consecutive legislative sessions that allows the university to operate more efficiently, institute better business practices, achieve savings, and expand its complement of international students. The legislative highlights include:
 - Developing strategic sourcing contracts for scientific equipment and supplies that saved nearly \$1 million in its first year over existing state contract.
 - Easing restrictions on property acquisition.
 - Streamlining process for approving cash-funded projects.
 - Streamlining the bonding statute to provide flexibility to use surplus revenues for other capital construction and maintenance projects.
 - Ensuring that international students no longer count against CU's state-mandated cap on non-resident students. Before the legislation, CU-Boulder had the second-lowest enrollment of international students in the prestigious Association of American Universities. Now, the international student population has grown from 4% to nearly 12%.
- CU restructured key boards of directors, including the FRA, and strengthened ties with the University of Colorado Real Estate Foundation, which allows CU to benefit from the expertise of board members who are experts in the field.
- CU built relationships and collaborated with partners to advance crucial transportation projects: widening I-225, adding the 17th Place interchange; constructing the FasTracks line along I-225, including facilitating its realignment for access and cost containment; and beginning to construct BRT lanes along US 36.
- CU's Task Force on Efficiency, which President Benson constituted after hearing about red tape across the system during the presidential selection process, reduced the number of university policies from 210 to 88, from a total of 650 pages to a total of 265.
- CU expanded its outreach by creating the CU Advocates program, a 2,500-person network that assists with advocacy on CU's behalf, fundraising, and outreach activities to improve the university's general image and reputation.

“Significantly, President Benson has made big strides in gaining the support of the faculty. Initially, some academics opposed him largely because (a) he was in the oil business...and (b) he has only an undergraduate university degree. Turns out these

are two glorious plusses.... Benson’s focused business approach gleaned from his work in oil and energy is different [from academics’]: basically, his concept is that if the cattle need to be fed, jump in the truck and go feed them. Done. This kind of effectiveness is not lost on a high percentage of an excellent University of Colorado staff and faculty.” (Participant)

“He has strong people in leadership roles within the system and across the campuses, who provide leadership across the system the information they need to make the best decisions. He is not a micromanager – he gives the Chancellors autonomy to lead their campuses and holds them accountable.” (Participant)

“Bruce Benson’s network is huge. He has the ability to bring the right people to the table to get things done.” (Participant)

3. **Finances:** President Benson has provided leadership over the finances of the university and steered CU through challenging economic times and steep funding declines while diversifying revenue streams. He instituted efficiency enhancements, both internal and external.

Some trends over his presidency illustrate the financial challenges CU faced:

	<u>FY ‘08</u>	<u>FY ‘14</u>
State funding	\$228M	\$150M
Funding as % of budget	9.5%*	5.4%
Student Enrollment	54,174	58,166**

*FY 09

**FY13 total

“Another theme is fiscal responsibility, whether that is enhancing the revenue streams we have influence over to instituting better business practices to securing legislation that allows us to operate more efficiently. One thing I am particularly proud of is guiding the university through the worst recession in 75 years while maintaining quality and positioning it to thrive in the future.” (Benson)

- CU successfully completed its *Creating Futures* fundraising campaign in November, 2013. Chaired by President and Mrs. Benson, it was announced publicly in April 2011. The campaign raised more than \$1.5 billion to support scholarships, academic program enhancements, endowed chairs, and facilities at the university.
- CU has set records in annual fundraising totals for each fiscal year of President Benson's tenure. In the last full fiscal year before President Benson’s tenure the fundraising total was \$133.5 million. Last year’s total fundraising almost doubled that figure, to \$258.8 million. Despite the success, Benson is leading a complete revamping of CU’s fundraising

operations with the goals of doubling donations and placing CU in a fundraising league with some of the nation's top public universities.

- CU has set records in research funding during Benson's tenure. In the last full year before President Benson's tenure, CU attracted \$637 million in research funding. Last year's total was \$774 million. Despite the success, Benson initiated a project to bolster CU's research funding aimed at enhancing its funding from private industry and philanthropic entities, streamlining internal processes, and realizing a greater return on its intellectual property.
- CU administration adopted a variety of cost-savings measures that total millions, including self-funding its employee health plans, reducing banking costs, gaining funding through more favorable bond ratings, relocating and consolidating administrative functions, and changing travel procedures and vendors. Administrative costs are now 43% below CU's peer institutions.
- The faculty commitment to CU's continuing success is evidenced by nearly 25% of faculty teaching beyond their required workload for only a small stipend.
- Contracting for procurement and travel cards will generate millions in savings and also allow the implementation of an e-procurement system to generate further savings.
- CU moved from the Big 12 to the PAC 12 Conference, which resulted in expanded visibility, revenues, research partners, and alumni connections that increased from 11,000 to 54,000.

"Under President Benson's leadership, these past years have been a very progressive time when it could have been a very regressive time with the economic conditions CU was facing." (Participant)

4. **CU's Mission:** President Benson has honored and met CU's mission.

"We also focus on our core mission in learning, teaching and research. Despite the fiscal challenges noted above, we have been able to enhance our academic programs and offerings, particularly in areas of excellence such as biotechnology and precision medicine. We continued to provide Colorado and the nation with a highly skilled workforce for today's key economic sectors, including health care, energy, aerospace and biotechnology. Additionally, we are skating to where the puck is headed with our efforts in online education and MOOCs." (Benson)

- CU earned unqualified 10-year accreditation from the Higher Learning Commission of the North Central Association for its administratively consolidated downtown Denver campus and Anschutz Medical Campus and for the Boulder campus.
- The launch of the \$661 million MAVEN mission to Mars, led by CU-Boulder, was an unqualified success.

- CU Anschutz Medical Campus faculty are conducting leading-edge research on Alzheimer’s disease and cancer.
- A new business school building opened with significant public-private partnerships at CU Denver.
- The City of Colorado Springs’ development of the North Nevada corridor in partnership with the Colorado Springs Campus has the new Lane Center for Academic Health Sciences as its centerpiece, resulting in job growth with related business development.
- CU created the Online Education Committee with faculty members from the prestigious President’s Teaching Scholars program and other faculty who are examining how technology can better be used to deliver high-quality education for lower cost.
- CU-Boulder and the CU system have contracted with Coursera, one of the nation’s leading providers of online education and massive open online courses (MOOCs). MOOC enrollment in CU courses now exceeds 200,000. Additionally, CU provided leadership in opening opportunities for other AAU state systems to participate.
- CU solidified arrangements with affiliate hospitals and was involved in the creation of University of Colorado Health, which includes University of Colorado Hospital, Poudre Valley Hospital and Medical Center of the Rockies, Memorial Hospital in Colorado Springs, Sidney Regional Medical Center in Nebraska and Iverson Hospital in Laramie, Wyoming. The network has a total of seven hospitals with 15,000 employees and a \$2.5 billion budget.
- CU re-established a relationship with one of Colorado’s oldest and largest philanthropies, the Boettcher Foundation, resulting in a partnership that created a biomedical research grant program. The Boettcher Webb-Waring program funds promising research by early-career scientists in medicine and biosciences.

*“He is broadening culture of academia, political, and cultural diversity of thought.”
(Participant)*

“He is a strong supporter of diversity and inclusion in all of its forms.” (Participant)

KEY STYLE THEMES

Many of the participants provided thoughts about President Benson beyond his accomplishments. These perspectives describe him as a leader and require little or no summation. The following small sample demonstrates how others see President Benson going about his work – his manner, his style, his substance – as a way to provide a glimpse of who he is as a person. All are direct quotations by assessment participants.

CU Commitment

“Bruce has noble aspirations - no personal aspirations, no hidden agenda.”

"He has a passion for CU and wears it on his sleeve."

"Effective as advocate for Colorado and higher ed nationally, and can bring coalitions together."

"Outstanding job of outreach to CU community and Colorado."

"His connections are extraordinary and he uses them for the good of CU & CO."

"He has worked tirelessly in political and philanthropic realms. Bruce spends every waking hour thinking... or acting on behalf of CU. And his wife is just as committed. The University is very lucky to have them both."

"Carries the CU flag high."

"Benson backs up his love for and devotion to CU with significant financial contributions. His checkbook has been at the ready for years."

Business Acumen

"His financial understanding, business knowledge, and leadership steered CU on a steady course and protected it during harsh economic times. He steered it clear of the fiscal cliff when state funding dropped; instituted institutional efficiencies and real cuts to address a real problem."

"His absolute ability to get things done on behalf of CU, along with his work ethic, are truly extraordinary."

"His extensive background in education gives him a broad perspective on the current, and historical, issues facing higher ed."

"His legislative contacts and experience were extremely helpful in passing legislation that helped not only CU, but all of the students in Colorado and the state as a whole."

"He is an excellent fundraiser."

Management/Leadership Style

"He walked a purposeful, appropriate line between the operations of the enterprise and the operations of the campuses -- is viewed across the board as someone who allowed autonomy for the Chancellors yet holds them accountable."

"Built bridges between himself and faculty."

“Knows what he doesn't know and is gracious about what others do know. He will change his mind on things if offered a compelling case.”

“He has a lot of confidence - the kind that comes with running successful businesses and is clearly comfortable making decisions.”

“The dog that didn't bark - has been able to neutralize sensitive issues so they never became inflamed and caused problems. Kept smooth operations.”

OPPORTUNITIES FOR CONTINUED SUCCESS

Despite the successes President Benson has achieved, many participants recognized there have been some bumps along the path. Mostly, struggles have occurred due to style, not substance. Addressing these provide continued opportunities for success.

1. Although every participant believes President Benson contributes greatly to CU's success, several noted that it can be challenging to work with him. He can push back on others' ideas and may not seem to listen. Yet they note President Benson will frequently incorporate that feedback into his thinking and modify his plans to reflect others' concerns.
2. During his tenure, President Benson has experienced periodic challenges with the Board of Regents, which is not unusual in a system like CU, especially in light of the fact its members are nine independent-minded elected officials. In President Benson's case, the challenges may have stemmed, in part, from some regents' perception that the president does not recognize the value of the service and contribution of the volunteer regents. His style of leadership has been described as “command”, rather than collaborative. Nonetheless, there is broad recognition among the regents and other participants that President Benson has made considerable progress in his relationship with the Board of Regents and has worked to improve communications. As one participant said, “He is a tiger that has changed his stripes a bit over recent years, and that is helping ease conflicts with the Board.” Improving the relationship between President Benson and the Board of Regents is an area where both parties should devote effort. When President Benson and the Board are rowing in the same direction, the university advancement is enhanced.
3. The university serves the entire state of Colorado. While it is true that the CU's campuses are located along the Front Range, some participants would like more attention paid to other regions of the state. President Benson has responded by creating “CU for Colorado” and instructed his staff to pursue more outreach opportunities, but additional effort could not only benefit the entire staff but also bolster the CU's image and reputation.

4. President Benson is rightly credited as being a strong, task-oriented leader, but several participants noted that CU does not have an articulated, system-wide strategic vision; consequently, the campuses have set their priorities independent of the system. This may result in diminished opportunities for CU to take advantage of its combined strengths. Recently, however, the CU began system-wide discussions about online education and technology; the university could benefit from more discussions of this nature and scope.
5. President Benson and the chancellors are a very experienced leadership team. Several participants expressed a concern that President Benson has not laid the groundwork for inevitable changes in CU's senior leadership. Others believe there should be more diversity among senior administrators. Accordingly, an opportunity exists for President Benson to evaluate the university's future needs and implement strategies that will result in an inclusive, talented pool of candidates for senior leadership opportunities. President Benson has begun to respond to this opportunity with a comprehensive succession planning initiative for his senior leadership positions.
6. The university faces unique challenges with the State of Colorado's funding for state institutions of higher education, which funding ranks among the lowest in the country. While CU has found other sources and operates as efficiently as possible, tuition rates have increased during President Benson's tenure. Continuing to pursue new and non-traditional funding sources will be an important measure of President Benson's legacy as he continues in the presidency.

CONCLUSION

"Everyone comes with assets and liabilities; Benson's assets far outweigh his liabilities." The word cloud in Attachment C is created from words that were used to describe President Benson. The bigger the word, the more frequently it was used by evaluators. The words portray a complex individual doing a complex job leading a complex institution filled with people who have shared and contradictory agendas.

President Benson is, indeed, a fully-formed man, shaped by his lifetime of experiences and tough decisions. He is heralded for his many good qualities and how he fights for CU every minute of his very long days. People across the spectrum also understand and appreciate his complexity. "His heart is, and always has been, in the right place. I like him, even though I don't always agree with him." Ultimately, a feeling expressed by many was captured in the words of one respondent, "He can be a pain in our ***, but we're glad he's ours and we're very lucky to have him."

President Benson is seen as having built a strong foundation, positioning CU well for the next leader to address future issues facing higher education. Due to his leadership, he has built an institution that will attract strong candidates for a successor. In the meantime, he has a comprehensive list of long-range projects to which he is committed

(Attachment D). He also has the support of many in the community who see CU poised to take on the big challenges relative to the future of higher education – to go for the “moon shot.” In summary, both President Benson and the University of Colorado have accomplished much over the first five years of his presidency and his service will be long-remembered by the state of Colorado.

In accordance with Regent Policy 3, revisions to the president’s position description are shown in redline version as Attachment E.



June 4, 2014

To: Regent Michael Carrigan, Chair,
University of Colorado Board of Regents

From: Bruce D. Benson, President

Subject: Self-evaluation of the Presidency, 2008 - 2013

In the following section is the statement of accomplishments for my comprehensive five-year evaluation, which covers the period from my start date (March 10, 2008) through June 30, 2013. Since many of the initiatives are multi-year in nature, there is some overlap with initiatives in the current fiscal year. I am providing the self-evaluations from my first five years in addition to a summary document that summarizes the university's major accomplishments over that time.

I would note that while I am the one being evaluated, none of the things that have been accomplished over the five-year period could have been achieved without a team of great people. I work with the Board of Regents, campus leaders, my executive staff, and affiliates and external entities. Succeeding at CU requires a team effort, and I work with a highly productive team.

A few themes emerge as constants throughout our work. First and foremost, we focus on the university's reputation as the bedrock for all we do. We promote the positive and address the negative. Outreach has been a continual priority for us, from creating the 2,500-strong CU Advocates program and CU for Colorado to establishing a social media presence to our branding effort to growing our constituent email list from 80,000 to 382,000. Additionally, we are embarking on a significant marketing program to raise our profile.

Another theme is fiscal responsibility, whether that is enhancing the revenue streams we have influence over to instituting better business practices to securing legislation that allows us to operate more efficiently. One thing I am particularly proud of is guiding the university through the worst recession in 75 years while maintaining quality and positioning it to thrive in the future.

We also focus on our core mission in learning, teaching and research. Despite the fiscal challenges noted above, we have been able to enhance our academic programs and offerings, particularly in areas of excellence such as biotechnology and precision medicine. We continued to provide Colorado and the nation with a highly skilled workforce for today's key economic sectors, including health care, energy, aerospace and biotechnology. Additionally, we are skating to where the puck is headed with our efforts in online education and MOOCs.

Another theme is our focus on engaging external partners. We have done so through public-private partnerships, affiliations with hospitals, development of the FRA, addressing transportation issues with RTD, Denver and surrounding communities.

I appreciate the opportunity to share our accomplishments with you. And I am honored and privileged to lead this great university.

UNIVERSITY OF COLORADO
SELECTED ACCOMPLISHMENTS, 2008-2013
BRUCE D. BENSON, PRESIDENT

Below is a sampling of accomplishments over the first five years of my presidency. The list is not exhaustive, but highlights some of the primary achievements of my leadership team and me. Detailed outcomes are contained in the annual self-evaluations, which follow this summary.

Reputation

CU has bolstered its reputation as one of the leading public universities in the world. We have promoted substantial successes at CU, including the launch of the \$661 million Maven mission to Mars, led by CU-Boulder, leading-edge research by CU Anschutz Medical Campus faculty on Alzheimer's disease, cancer and precision medicine, a new business school building with significant public-private partnerships at CU Denver, and development of the North Nevada corridor in partnership with Colorado Springs. After CU suffered negative fallout from high-profile public issues (football recruiting scandal, Ward Churchill episode) I led daily efforts to ensure the university's reputation is strong by addressing problems immediately. For example, I worked with Boulder campus leadership on a sustained effort to shut down the 4/20 event on the campus.

Academics

CU created the Online Education Committee comprising faculty members from the prestigious President's Teaching Scholars program and other faculty who are examining how technology can better be used to deliver a high-quality education for lower costs. CU-Boulder and the CU system have contracted with Coursera, the nation's leading provider of massive open online courses (MOOCs). MOOC enrollment now exceeds 200,000.

CU earned unqualified 10-year accreditation from the Higher Learning Commission of the North Central Association for its administratively consolidated downtown Denver campus and Anschutz Medical Campus, as well as reaccreditation for the Boulder campus.

Funding

CU successfully completed its \$1.5 billion *Creating Futures* fundraising campaign in November, 2013. Marcy and I chaired the campaign (the second CU campaign we have chaired), which was announced publicly in April 2011. It raised more than \$1.5 billion to support scholarships, academic enhancements and facilities at the university.

CU has set records in its annual fundraising totals in each fiscal year of my tenure. Last year's total was \$258.8 million. In the last full fiscal year (2006-07) before I took the job, CU raised \$133.5 million. Despite the success, we have undertaken a complete revamping of CU's fundraising operations to more than double donations, putting CU in a fundraising league with some of the nation's top public universities.

CU has set records in research funding during my tenure. Last year's total was \$774 million. In the last full fiscal year (2006-07) before I took the job, CU attracted \$637 million in research funding. Despite the recent success, I collaborated with campus leadership to initiate a project to bolster CU's research funding aimed at diversifying its partner base (to include more business/industry and philanthropic entities), streamlining its internal processes and realizing a greater return on its intellectual property.

Legislation

CU secured legislation in five consecutive legislative sessions that has allowed it to operate more efficiently, institute better business practices, achieve savings and expand its base of international students. Examples include:

- Contracting for procurement and travel cards that will generate millions in savings and also allowing the implementation of an e-procurement system to generate further savings.
- Developing strategic sourcing contracts for scientific equipment and supplies that saved nearly \$1 million in its first year over existing state contract.
- Easing restrictions on property acquisition.
- Streamlining process for approving cash-funded projects.
- Streamlining the bonding statute to provide flexibility to use surplus revenues for other capital construction and maintenance projects.
- Ensuring that international students no longer count against CU's state-mandated cap on non-resident students. Before the legislation, CU-Boulder had the second-lowest enrollment of international students in the prestigious Association of American Universities (AAU). Since the legislation, international student enrollment has increased by 69 percent in FTE and 51 percent in headcount.

CU enhanced its lobbying presence in Washington D. C. with the opening of an office in the nation's capital and hiring an accomplished lobbyist (Abby Benson). With earmarks drying up, this was a critical refocusing of our efforts.

Efficiencies

CU's Task Force on Efficiency, which I constituted after hearing about abundant red tape across the system during the presidential selection process, reduced the number of university policies from 210 to 88, from a total of 650 pages to a total of 265.

Many CU faculty across the system voluntarily increased their teaching and advising loads for minimal additional compensation.

CU has worked to achieve balanced viewpoints on campus through initiatives such as the privately funded Chair in Conservative Thought and Policy, the Western Civilization certificate program, and we initiated the exploration of a creating a center similar to those at Stanford and Princeton.

CU administration adopted a variety of cost-savings measures that total millions, including creating the University of Colorado Health and Welfare Trust (self insurance), conducting an insurance audit, reducing banking costs, gaining funding through more favorable bond ratings, relocating and consolidating administrative functions (procurement, payroll, University Information Systems), and changing its travel procedures and vendor.

CU engaged in a branding project that eliminated more than 400 confusing and competing visual identities in use on campuses and with university affiliates, enhancing how the university projects its image and engages its constituents. The cornerstone of the project is that CU is one university with four campuses. The visual representation of that is the interlocking CU as the university's primary mark.

Organization

CU developed a leadership team of campus chancellors that is a mix of veteran CU leaders and seasoned business/government leaders. Concurrently, the university maintained continuity in the president's executive team with key hires, primarily from inside the university.

Outreach

CU expanded its outreach by creating the CU Advocates program, a 2,500+ person network that assists with legislative activities, fundraising and general image/reputation.

CU established *CU for Colorado*, which highlights the more than 260 educational, health and community service outreach programs across the state, in addition to more than 400 CU-affiliated clinic sites. One of the goals of CU for Colorado is to help market the university.

CU enhanced how we engage external constituents by creating an electronic communication program that increased the number of constituent email addresses in its master database from 80,000 to 382,000. Additionally, I established a social media presence on Facebook and Twitter, a first for a CU president.

Partnerships

CU restructured key boards of directors, including the Fitzsimons Redevelopment Authority, and strengthened ties with the University of Colorado Real Estate Foundation, which allows CU to benefit from the expertise of board members.

CU has created several public-private partnerships, including the JP Morgan Center for Commodities and the Pinnacol Assurance program.

CU created a biomedical research grant program in partnership with one of Colorado's oldest and largest foundations (Boettcher Foundation). The Boettcher Webb-Waring program funds promising research by early-career scientists in medicine and biosciences (while also averting a costly lawsuit).

Healthcare

CU solidified arrangements with affiliate hospitals and was involved in the creation of University of Colorado Health, which comprises University of Colorado Hospital, Poudre Valley Hospital and Medical Center of the Rockies, Memorial Hospital in Colorado Springs (two facilities, north and central), Sidney Regional Medical Center in Nebraska and Iverson Hospital in Laramie, Wyo. The network has a total of seven hospitals with 15,000 employees and a \$2.5 billion budget.

The University of Colorado Hospital was named the top academic hospital in America for two consecutive years. It is staffed by physicians from the CU School of Medicine.

CU is making investments to make it a leader in precision medicine, which uses an individual's genetic code to tailor medicine/treatment/therapy for a variety of health issues.

CU is positioning itself to secure designation from the National Institute on Aging for a Alzheimer's Research Center on the Anschutz Medical Campus, led by Dr. Huntington Potter, a renowned Alzheimer's researcher. It would be one of only 27 such centers in the country and the only one in the Rocky Mountain West. Note: The university secured legislation in 2014 that will contribute \$250,000 in seed money from the state and demonstrate state-level engagement, with plans for more state funding in future years.

Athletics

CU joined the Pac-12 athletic conference, which not only benefits CU Athletics by its place in the "Conference of Champions," but also helps us develop better connections with alumni and donors in the Pac-12 footprint, recruit non-resident students from a significant feeder region, and foster research partnerships with some of the country's top research institutions.

CU hired new leadership in the athletic department, as well as several coaches (including football and men's and women's basketball). It also developed a facilities program plan and fundraising effort (which has had greater success in eight months than any single year in the department's history, in addition to creating a strategic plan that guides the department.

Transportation

CU built relationships and collaborated with partners to advance crucial transportation projects, including the widening of I-225 and addition of the 17th Place interchange, the FasTracks line under construction along I-225 (and facilitated the realignment of the line from the previous plan on Montview to the new configuration along Fitzsimons Parkway) to the DIA line, and under construction BRT lanes along US 36.

Real Estate

CU refocused some of its property assets, including the 9th and Colorado property (the former Health Sciences Center), which is now under contract (closing set for December) and the Given Institute in Aspen, which was sold.

Self-evaluation

FY 2009

Note: This document was used as a basis for an oral discussion of the President's performance at fiscal year's end.

MEMORANDUM

DATE: September 12, 2008

TO: Bruce D. Benson
President

FROM: Steve Bosley
Chair

RE: Annual Performance Plan

This memorandum describes our mutual expectations on which your performance will be evaluated for the period from July 1, 2008 to June 30, 2009. This performance plan was developed based upon input from you and members of the Board of Regents. It is the Board's intent that your focus be on the major categories and that the bullet points are examples to help guide you in being successful. We do not want you to dilute your efforts by trying to specify too many individual performance expectations. Similarly, we do not want you to forego strategic opportunities to further the interests of the University, simply because they are not identified in this plan.

1. Board Relationships. Work effectively with the Board of Regents. Examples of performance expectations include:
 - Communicate timely, effectively, and equally with all Regents
 - ✓ Provide detailed weekly report of issues/activities.
 - ✓ Meet individually with regents.
 - ✓ Call all board members on select pressing issues.
 - ✓ Provide report at each board meeting.
 - ✓ Share internal and external communications (budget communiqués, op-eds, etc.) with board before general distribution.
 - ✓ Provide legal and media alerts as necessary.
 - ✓ Restructured board orientation.
 - Engage the Regents in long-term strategic planning and short-term policy decisions, including the budget planning process

- ✓ Engage regents in planning and policy discussions at board meetings and in conversations.
- ✓ Provide board with options for tuition models.
- ✓ Direct vice president for budget and finance to meet one-on-one with board members to review budget matters before each board meeting (at board's discretion).
- ✓ Provide Quarterly Financial Report for board.
- Engage Regents individually and as a Board internally and externally to achieve university goals such as working with the private sector, legislature, other state boards and/or outreach programs
 - ✓ Involved board members in legislative advocacy through events and personal contacts.
 - ✓ Featured board members at CU Advocacy Day at the capitol.
 - ✓ Included board members on outreach trips around the state.
 - ✓ Engaged board members in donor thank you letters and calls.
 - ✓ Involved board members in various alumni, donor and friends events.
 - ✓ Requested that board members take on speaking engagements representing CU.
 - ✓ Facilitated public testimony at board meetings. Bruce D. Benson

2. Strategic Leadership. Foster and build upon the strengths of the university and provide leadership in developing a clear vision for the university.

Examples of performance expectations include:

- Consult with the Board to identify three to five short-term strategic priorities to include in next year's performance plan
 - ✓ Continue items listed below and pursue new items.
 - ✓ Manage university reputation.
 - ✓ Stabilize and improve funding sources.
 - ✓ Foster teamwork and cooperation among system and campuses, as well as with affiliates (CU Foundation, CUREF, CU Hospital).
 - ✓ Determine effectiveness of consolidation.
 - ✓ Complete branding project and implement.
 - ✓ Continue to review and revise structure and efficiency of university, particularly system administration.
 - ✓ Consider shared services model.
 - ✓ Enhance diversity in all its forms, including political diversity.
 - ✓ Complete consolidation study.
 - ✓ Make each campus more efficient.
 - ✓ Use branding work to establish basis for vision.
 - ✓ Coordinate campus strategic plans and use as basis for the university plan.
 - ✓ Engage CUREF and CU Foundation more on campus projects.
 - ✓ Explore options for self-insurance for health benefits.
- Maintain a commitment to the educational benefits derived from a diverse campus community, including students, faculty and staff
 - ✓ Working with chancellors to develop plans to foster political diversity.
 - ✓ Expanded and engaged Blue Ribbon Commission on Diversity in ongoing efforts.
 - ✓ Promoted effort to increase enrollment of international students.
 - ✓ Established partnership with Denver Scholarship Foundation to bring several hundred students (primarily ethnic minorities) from Denver Public Schools to CU.
- Encourage a culture of entrepreneurship that stimulates the identification of new opportunities
 - ✓ Crafted win-win deal with CU/Webb-Waring/Boettcher Foundation.
 - ✓ Examining the potential for self insurance for health benefits.
 - ✓ Reviewed and rejected McWhinney land proposal.
 - ✓ Working on research diamond proposal with UCB.

- ✓ (LD)Explored School of Medicine partnership with St. Mary's Hospital in Grand Junction. (not affordable now)
- ✓ Exploring opportunities for more closely partner with Children's Hospital.
- ✓ Restructured leadership for CUREF to allow for more entrepreneurial involvement at the campuses.
- ✓ Worked with public and private interests to forward biotechnology initiative and biotechnology building.
- Develop and implement an effective legislative strategy
 - ✓ Restructured Government Relations effort with a greater focus on securing federal funds; elevated to vice president.
 - ✓ Engaged federal lobbying firm to increase university presence in Washington, D. C.
 - ✓ Involved campus researchers and friends of the university in securing stimulus funding from federal agencies.
 - ✓ Connected with leadership of ConocoPhillips to explore joint opportunities.
- Develop and implement strategies to continue to improve the university's image and reputation and to maintain the public's trust and confidence through transparency, accountability and efficiency
 - ✓ Conducted 25+ outreach stops around the state.
 - ✓ Placed more than 20 op-eds in newspapers around state.
 - ✓ Instituted electronic media engagement plan and met with station managers/news directors of Denver TV stations (including Univision) and major radio stations (Clear Channel).
 - ✓ Created President's Newsletter for more than 80,000 key CU stakeholders, sent bimonthly.
 - ✓ Delivered series of internal budget communiqués to faculty and staff aimed at greater transparency.
 - ✓ Created Task Force on Efficiency and adopted recommendations.
 - ✓ Produced institutional Public Service Announcement for television, highlighting CU's major initiatives on all campuses.
 - ✓ Made concerted and coordinated effort to improve relationships with Aurora elected officials and economic development leaders by meeting with them individually and in groups, as well as hosting joint events.
 - ✓ Developed website to detail what CU does for communities around Colorado.

- Model the open communications, integrity and behavior expected of others within the university
 - ✓ Conducted 25+ outreach events around the state.
 - ✓ Placed series of op-eds in newspapers around state.
 - ✓ Instituted electronic media engagement plan.
 - ✓ Created President's Newsletter for key CU stakeholders.
 - ✓ Delivered series of internal budget communiqués aimed at greater transparency.
 - ✓ Directed single-source platform for communications to alumni and key stakeholders, who will be reachable via single-source e-mail (rather than previous model of going through each campus).
- Complete the branding study and implement it to increase the value of the University of Colorado brand
 - ✓ Hired well-regarded branding firm after extensive RFP process.
 - ✓ Assembled high-level CU team to shepherd the project, including president, chancellors, Foundation president, chief of staff, communications AVCs.
 - ✓ Engaged CU alumna with considerable professional experience in branding to assist with project.
 - ✓ Project completion expected in early summer; implementation to follow.
- Additional Considerations
 - ✓ Worked with governor, legislature and other higher education leaders to secure funding for AHEC Science Building, which CU shares.
 - ✓ Improved relationships and interactions with other Colorado colleges and universities. Mines, CSU, NREL collaboratory; School of Public Health. Concept was not always successful
 - ✓ Developed a focus on addressing problems immediately, before they became issues in the media. No lingering negative issues in media in past year +.
 - ✓ Settled CU nomenclature issue at board direction.
 - ✓ Joined board of University of Colorado Hospital and actively participated.
 - ✓ Worked to align University of Colorado Hospital more closely with university.
 - ✓ Engaged Veterans Administration in talks about partnership with proposed VA Hospital and research partnership.
 - ✓ Sold UPI Building to VA; new UPI Building under construction.

- ✓ Working with Congressional delegation and Aurora leaders on I-225/Colfax interchange; halfway done.
- ✓ Consulted on affiliation agreement with Children's Hospital.
- ✓ Offered and provided lobbying help in Washington to the governor and state legislature.

3. Financial Performance. Oversee the fiscal management of the university and compliance with applicable laws, regulations, rules and policies. Explore opportunities to increase institutional resources through federal and state appropriations, grants and contracts and private gifts. Examples of performance expectations include:

- Work toward a sustainable funding model on three fronts: federal, state and private. Goals for increasing funding includes a 5% increase in federal funding, developing a strategy for addressing the state funding shortfalls, and a 10% increase in private funding
 - ✓ Aggressively lobbied Legislature, governor and CCHE for state funds.
 - ✓ Pressed university's case on funding formula with CCHE, governor and legislature.
 - ✓ Engaged federal lobbying firm to increase CU's presence in Washington, D.C.
 - ✓ Pushed business, labor and community leaders to assess the potential for ballot initiative. (determined the time is not right)
 - ✓ Continued cultivation of more than 100 major donors in Colorado and across the country through individual meetings, lunches and dinners, often with support from Marcy Benson.
 - ✓ Established project to develop comprehensive list of key university constituents.
 - ✓ Director of comprehensive campaign hired by CU Foundation.
 - ✓ Engaged key volunteers in fundraising efforts (Marcy Benson, Charlie McCord, and many others).
 - ✓ Restructured CUREF leadership, including joining board of directors.
 - ✓ Organized campuses and Government Relations to aggressively pursue stimulus funding. Hired consulting firm to complement university effort.
- Continually examine expenditures to creatively and efficiently maximize the value of those expenditures
 - ✓ Reorganizing system administration for more efficiency and effectiveness.
 - ✓ Strategically implemented budget reductions and positioned university for addressing three-year budget horizon.
 - ✓ Proposed flexibility legislation to Joint Budget Committee; worked with Legislature and other colleges and universities to get proposal into legislative process. Pieces include tuition flexibility, financial aid flexibility, easing of select fiscal rules, deregulation for cash-funded

- projects, PERA clarification, and changes to counting international students.
- ✓ Created Task Force on Efficiency and adopted recommendations.
 - ✓ Explored state budget solutions through VP for Budget and Finance task force. (timing not right to proceed)
 - ✓ Examined options for 9th and Colorado property in light of delay of sale by Shea.
 - ✓ Reviewed and revised funding support model for CU Foundation.
- Create and maintain an atmosphere of trust and integrity involving university financial operations
 - ✓ Managed transition of university vice president for budget and finance by gathering insight from respected former VP (Bliss) and elevating Kelly Fox to interim position.
 - ✓ Communicate financial information via budget updates to faculty and staff.
 - ✓ Meet with faculty and staff governance groups to provide information.
 - ✓ Clean external audit of university finances (only one non-material finding).
 - Prepare and present meaningful budget options to the Board for its consideration
 - ✓ Direct vice president for budget and finance to provide board with tuition options.
 - ✓ Provide board with budget dashboard indicators for quick review of key budget indicators.
 - ✓ Provide board with Quarterly Financial Report.
 - Encourage proper resources for the development of grants and contracts including the associated financial compliance needs
 - ✓ In process.?

4. Working Relationships with Chancellors and Campuses. Work effectively with the Chancellors and campus constituencies to develop productive working relationships to further the best interests of the university. Examples of performance expectations include:
- Work with the chancellors to develop campus cultures of excellence in academics, research and service
 - ✓ Managed successful chancellor transition at UCB.
 - ✓ Developing plans and providing funding to implement enhanced testing initiative at board's direction.
 - Work with the Chancellors to implement the Board approved campus strategic plans
 - ✓ Directed chancellors to review, revise and prioritize strategic plans in light of economic conditions.
 - ✓ Working with Chancellor Shockley to make connections between UCCS and US Olympic Committee.
 - Demonstrate the value the University of Colorado brings to the state
 - ✓ Published more than 20 op-eds about value of higher education in statewide newspapers.
 - ✓ Distributed Economic Impact brochure/website to demonstrate CU's contributions.
 - ✓ Conducted statewide outreach tour with primary theme of the value of higher education.
 - ✓ Promote value of higher education/CU in every meeting with legislators. (MHB).
 - ✓ Promote value of higher education/CU in every meeting with editorial boards and electronic media news directors/station managers.
 - Continue to implement the recommendations of the Independent Report on Tenure-Related Processes Measure and report on the results of the implementation
 - ✓ Developed and posted web site on tenure-related processes as called for in Estes Report.
 - Evaluate programs for continued value to the university and the state, including the potential for discontinuance
 - Maintain a commitment to the educational benefits derived from a diverse campus community, including students, faculty and staff
 - ✓ Working with chancellors to develop plans to foster intellectual diversity (BDB)
 - ✓ Expanded and engaged Blue Ribbon Commission in ongoing efforts.

- ✓ Promoted effort to increase enrollment of international students.
- ✓ Established partnership with Denver Scholarship Foundation to bring several hundred students (primarily ethnic minorities) from Denver Public Schools to CU.

Self-evaluation

FY 2010

TO: Board of Regents
FROM: Bruce D. Benson
RE: Self Evaluation for 2009-2010
July 9, 2010



In 2008, Regents Hybl and Bishop developed five evaluation criteria that were approved by the Board: Board Relationships; Strategic Leadership; Financial Performance; Proper Resources for Development of Grants and Contracts; and, Working Relationships with Chancellors and Campuses. Although we did not revisit them this year, we are making progress in each area.

This year, your ad hoc Strategic Oversight Committee asked me for my top five strategic priorities. They are:

- Increase public confidence in higher education
- Pursue long-term funding solutions to ensure CU's core missions of education, research and service and protect current state appropriations
- Increase CU's internal efficiency and external flexibility
- Strengthen relationships with affiliated organizations
- Better position CU to increase private support

My self evaluation this year focuses on those. As you know, I am a note taker and list maker and I track some six pages of progress on individual projects. The majority of items relate to one of these five priorities. Following is an overview of activities rather than a detailed list. I am happy to share specific details with you or elaborate.

1) Increase Public Confidence in Higher Education

I continue to work across the state and in select cities nationally to engage key constituent audiences in higher education issues. In all efforts, I stress the importance of all of higher education while also focusing on the accomplishments, contributions and needs of CU. I spend considerable time working with elected officials to ensure their support. One of the important things we have done is to demonstrate the breadth and depth of CU's involvement around the state with a one-stop web site that highlights CU programs in every Colorado county, and also allows Coloradans to connect with our faculty and other resources.

In addition to the dozens of personal speaking engagements with groups ranging from Rotary Clubs to educational entities to groups on our campuses, I use earned media (largely op-ed pieces by me, but also pitching media stories) and media we control to spread the word (my bi-monthly newsletter goes to more than 110,000 alumni and friends). I have done many radio, TV and print interviews, which reach a large audience. We also continue to focus on effective internal communication with frequent system-wide communiqués on budget and legislative issues.

Part of ensuring public confidence in higher education is conveying that we are good stewards of public money and that we are doing all we can to be efficient and effective. These themes emerge in all of my talks and most of my writings. I have been vocal about the need to control mission creep among Colorado's colleges and universities. This includes CU. For example, we revised the UCD strategic plan to be realistic about its capacity to be a major research university.

I have also been involved in efforts at the state level to reinvigorate the CCHE and have it play a serious role in statutory missions and funding formulas. We have been deeply involved in the Higher Education Study Panel (the governor's higher ed strategic plan group), mostly trying to influence its direction and to keep it from veering off course. We have had limited success and I have significant frustrations with the process.

We have used the most recent legislative session to increase public confidence in higher education. In the conversation about freedom from state fiscal rules, we talked about our efforts to cut red tape and streamline administration. In the conversation about international students, we talked about enhancing the learning environment and Colorado's role globally. Even the tuition flexibility discussion, which we did not initiate, was an opportunity to talk about budget balancing and Colorado's place relative to national peers. We were able to educate and enlist many state lawmakers through the process.

We are working to step up our efforts to increase public confidence in higher education by improving the quality and currency of data in our master Advance database (which the CU Foundation maintains). We have awarded an RFP for developing online communities (contract pending) that will allow us to use electronic means more effectively to communicate with

alumni and friends. Concurrently, we are developing a statewide advocacy network that will have both grassroots and leadership level components. Additionally, our branding initiative should help us focus our messages and project a consistent, coordinated image.

Perhaps our most important effort in increasing public confidence in higher education is the ongoing focus we have placed on our image and reputation. From my first day on the job, I have stressed the need to address problems immediately, and we have done so. With the exception of coverage of the School of Dental Medicine, we have had few negative media stories. The university's reputation has recovered. So much of public confidence depends on how we guard our reputation and manage our image that this will be an ongoing and primary focus for me. We will continue to be open and transparent.

2) Pursue Long-Term Funding Solutions to Ensure CU's Core Missions of Education, Research and Service

I have been exploring the potential of revenue streams to help free CU from the constitutional and statutory budget gridlock that is squeezing funding for higher education. In particular, I have been thinking about alternative ways to fund programs at the Anschutz Medical Campus. Unlike the other campuses, it cannot grow out of its budget problems through enrollment and tuition. While I do not have a fully formed solution, I have ideas I will share with you before proceeding.

Some of the measures on the November ballot (Amendment 61) would effectively close our doors if passed, since our assessment is we would have to repay more than \$250 million in COPs overnight. You gave me the ability to fight the initiatives and I intend to do so. I also will ask you to vote at the retreat on a resolution opposing them.

I believe the new leadership model at UCD and AMC will allow us to focus our tight resources much better and address the issues specific to each campus. Jerry Wartgow and Lilly Marks have already hit the ground running. I feel that with their addition, we now have the complete team we need to move the university forward. I have received overwhelmingly positive response to the appointments. While there are still plenty of details to be worked out, there is a renewed enthusiasm among internal and external constituents.

We were successful in passing SB-3, which I believe will have a positive long-term impact on the university. Increasing the percentage of international students could bring us an additional \$65 million annually. It is important to note that doing so requires a substantial ramp up. We will not see substantial additional revenue next year or even in the next few years. However, we expect to see incremental gains in the next 5-10 years and beyond.

At the same time, the CCHE funding formula remains a constant concern. As I have mentioned in my assessment of the higher education strategic plan, there is a perception that CU is "rich," despite the fact that we are second to last in state funding per resident student and lowest in

state funding per degree granted. While part of my goal is to attract new funding, I also focus on maintaining state funding.

Private funding is also crucial to our success; I address that in section 5.

3) Increase CU's Internal Efficiency and External Flexibility

I want to highlight areas over the past two years where we are making significant progress toward efficiency and flexibility: reducing administrative bureaucracy; and legislative tools that come from SB-3, PERA changes and the DPA cleanup.

First, we have streamlined our administrative policies significantly. When I began my presidency, we had more than 210 administrative policy statements that bound faculty and staff. We have reduced that to 100. Many 20-plus page policies have been streamlined to fewer than five pages. We are maintaining proper checks and balances while reducing unnecessary red tape to make it easier for people to get their work done. We have created a user-friendly website with all the information.

Regarding administrative efficiency, we were a relatively lean organization two years ago and are even leaner now. We spend some 25 percent less on administration than our national peers, according to standardized data collected by the National Association of College and University Business Officers. We have reduced staff in central administration from 314 to 242 over two fiscal years.

We have balanced our budget (over two fiscal years) by \$51 million through strategic cuts, revenue enhancements and operational efficiencies. We will be prepared to arrive at the financial cliff once stimulus funding goes away (FY 11). This is an ongoing process.

We continue to move toward shared services to enhance efficiency, both among our campuses and with other higher education institutions. We have a working group meeting with colleagues from CSU in four key areas for shared services: IT, travel, procurement and library services.

Second, we passed a higher education flexibility bill. It is an important next step in our flexibility strategy. Despite many attempts to hijack our bill, we built coalitions to get the votes to pass our bill and others, including the PERA bill and DPA cleanup bill.

Our implementation of the various components of the bill over the next year will be critical to earn the confidence of the general assembly and the governor's office. We were also successful in quietly working to kill HB 1409 (regarding automatic classified salary increases), which would have inhibited our efficiency.

Self insurance should help us be more efficient in how we control and administer health care costs, with a projected annual savings of \$4 million to be shared between CU and our employees.

We are engaged in several large, long-term initiatives aimed at increasing our academic efficiency. We are gathering and analyzing data on the potential for combining and/or eliminating departments. Concurrently, we are examining classroom utilization to determine our capacity and where we may realize efficiencies.

On a related note, we have completed revisions of campus strategic plans to make them more realistic in light of current fiscal constraints.

4) Strengthen Relationships with Affiliated Organizations

We have made substantial progress in this area over the past two years. We now have healthy, functional relationships with the CU Foundation and CUREF. We are making good progress with our affiliated hospitals. We need to continue to focus on FRA. We also need to build on our work with cities such as Aurora and Boulder. Frankly, some of our relationships had deteriorated.

As an example, just before my arrival, the City of Aurora was so disenchanted with the university it felt the need to make a statement by renaming the primary entrance to AMC "Aurora Court." Now, we are working closely together on key projects such as I-225, FasTracks, hotel/conference development, and the VA. The FRA was another relationship that was frayed. I have been serving on that board and am working to focus the organization's efforts, which frankly have been weak.

Our relationships with partner hospitals are improving. I have been active on the UCH Board, working to bring the hospital closer to the university. Additionally, we are making great progress in our relationship with Children's Hospital. UCH recently signed the Moms and Babies agreement with Children's (a new approach whereby mothers and babies with medical issues are treated at one hospital instead of two). Additionally, we should soon sign the pediatric surgery center agreement, as well as our affiliation agreement, which has been in a state of flux for some time. At Phil Anschutz's request (in keeping with a direction we already were headed), we are working with Children's and UCH to market the campus as a major national and international health care destination.

Another relationship that was poor but is strong now is with CUREF. We have successfully drawn them back into the fold after they had operated more like a free agent in recent years. Members of the CUREF board have been a tremendous help in working with campuses on real estate issues. Their participation also provided a great example of why we should be free from state fiscal rule constraints. We made the case that their involvement was considerably more valuable than that of an entity that took 1 percent of sales for essentially doing nothing.

We continue to work with our colleague higher education institutions on partnerships such as the Colorado Renewable Energy Collaboratory (CU, CSU, Mines, NREL), the Colorado School of Public Health (CU, CSU, UNC), and the CU Cancer Center (CU, CSU). We are also developing new partnerships, including the shared services agreement with CSU mentioned earlier and the collaboration in southern Colorado between UCCS and nine other four- and two-year institutions.

One relationship we need to continue to work on is that with the CCHE. We have been actively engaged in the strategic planning effort, for the most part playing defense to prevent initiatives that would harm CU. We are working to foster better relationships with commissioners, as well as legislators sympathetic to our cause.

We also need to look for opportunities to find or strengthen relationships with other strategic partners. The Boettcher Foundation just awarded the first \$700,000 in research grants to support CU's young faculty. This is support we can expect on an ongoing basis as a result of the new \$40M endowment we put together two years ago involving the Boettcher Foundation, the Webb-Waring Foundation and CU.

5) Better Position CU to Increase Private Support

The first step in this strategic initiative was to continue to manage CU's reputation. I think we have made excellent progress in that effort, as I mentioned in section 1.

I have been working closely with Wayne Hutchens and the CU Foundation staff to lay the groundwork for the comprehensive campaign. An important component of that was hiring Patrick Kramer to lead that effort for the CU Foundation. Given the economic climate, we are being prudent in when we officially launch. Even in the challenging economic environment, the trajectory of our campaign is on track to raise the \$1.2 billion we have informally set as a goal.

We expected a significant drop off in donations this year, but early reports of year-end activity show we may actually surpass last year's total from the CU Foundation and the university.

The Foundation should benefit greatly from our branding effort. I have asked the chancellors and campus and system communicators to coordinate messaging with the Foundation.

Marcy has been a great asset with the Foundation in our outreach and in many other support roles. She is a great partner. She works with Connie Graham in the cultivation of our major donors and has been actively engaged in planning and implementation of our fundraising efforts. I continue to urge the CU Foundation to expand our list of donors and prospects, not to simply revisit the existing donors.

I continue to meet with major donors in Colorado and beyond. I have worked closely with Phil Anschutz on a variety of initiatives and maintain regular contact with our major donors. In our


travels around the state and nationally, I always meet with major donors and prospects. Marcy and I have met with donors in New York, Chicago, Phoenix, Palm Springs, Dallas, Houston and Washington and will continue to as we travel the country.

I want to mention again the relationship we created with Boettcher and Webb-Waring. Private support comes in many different ways and I am committed to look for opportunities beyond traditional philanthropy and capital campaigns. We were successful recently in attracting a \$5 million gift from Pinnacle Assurance, the largest gift ever to UCD.

I look forward to discussing with you my performance over the last year and receiving direction for the coming year.

Self-evaluation

FY 2011



TO: University of Colorado Board of Regents
FROM: Bruce Benson
RE: Self-evaluation
June 9, 2011

I am focusing my self-evaluation this year on outcomes – those things my team and I have accomplished to move the University of Colorado forward. Many of the items are multi-year endeavors that typically do not have a neatly defined beginning and end. As such, you will see many items that have taken place over the three-plus years of my presidency. I am also focusing on those that are ongoing or in progress, as well as those that are on my to-do list. There is a subtle difference between ongoing projects and those in progress. Ongoing efforts are things we do every day. Those in progress are efforts that are more project-specific, which will have either distinct phases and/or an end date.

In the more than three years since you named me president, the environment in which we operate has changed substantially. The challenges facing the university today are not the same as those we faced three years ago. We are continually adjusting to those changing realities. The items I list below all fall within the broad categories you have outlined as evaluation criteria for me (increase public confidence in higher education; ensure funding solutions to meet our mission; increase our efficiency; strengthen our relationships with affiliates; attract private support). I still agree with those criteria, but given the changing environment, you will see them described slightly differently. (Image/reputation/public confidence in higher education; Institutional culture of cooperation and coordination, internally and externally; Finance/comprehensive campaign/funding streams; efficiency enhancements; meeting CU's mission)

I believe the highest-priority challenges for me as president, in a big-picture sense, are to protect and enhance CU's image and reputation; promote an institutional culture (both internally and externally) of cooperation and coordination; ensure effective government relations (with the Colorado General Assembly, our Congressional delegation, and local governments); keep the university on sound financial footing in all its revenue streams; continue to implement operational efficiencies; ensure our Creating Futures campaign is successful; and meet our mission to our students and the state. The list below is in bullet-point format (divided by status of project and area of focus) to make it easier for you to digest. I would be happy to elaborate on any of the points. Some cut across categories and could be mentioned in multiple sections, but I have put them where I think they are most pertinent.

I would also like to say that my approach is to work as a team. I am proud of the team we have assembled at CU and our intense commitment and dedication to helping the University of Colorado be one of the premier public university systems in the United States. From your work on the Board of Regents to my executive team to the campus chancellors and their teams, we have had significant accomplishments in an extremely challenging environment. I look forward to working with you to continue making progress.

Completed Items

Image, Reputation and Public Confidence in Higher Education

- Launched outreach website
- Launched branding project
- Successfully secured Pac-12 membership, which will benefit UCB athletics, alumni/donor efforts, student recruitment (including international students) and research partnerships.
- Worked with CDOT to place Anschutz Medical Campus signs on I-70, I-225
- Kicked off UCD Business School building renovation project
- Fundraised \$15 million for Health and Wellness Center at Anschutz Medical Campus; building under construction
- Completed agreement on Conservative Chair structure and suggested potential donors

Institutional culture of cooperation and coordination (internal and external)

- Instituted strong leadership team
- Fostered culture of cooperation across campuses, higher education partners, business, communities
- Continued to build partnerships with K-12 community, particularly with current and previous commissioners of education, as well as with board
- Hosted series of receptions at our home for legislators
- Hosted breakfast meeting with Joint Budget Committee members
- Met regularly with governor and Denver mayor on issues of common interest
- Helped secure funding for I-225 interchange
- Helped secure funding for FasTracks bridge
- Promoted cooperation among faculty researchers for drug development center
- Had a hand in hiring new coaches in key UCB athletics revenue sports
- Improved relationship with City of Aurora
- Strengthened relationship with Aurora Economic Development Council
- Secured agreement with Children's Hospital on Pediatric Surgery Center
- Secured funding for AHEC Science Building and successfully brought online

- Met with Colorado Wins leadership three times to discuss their role and employee issues
- Contributed to development of child care center at AMC
- Partner with various entities to promote Complete CU and Complete College Colorado

Finance/comprehensive campaign/funding streams

- Achieved record fundraising over past three years (including top three totals ever)
- Agreed to lead Creating Futures fundraising campaign (with Marcy)
- Recruited volunteer campus leadership for Creating Futures
- Successfully launched public phase of Creating Futures
- Aligned campaign counting standards with recognized national standards (taking conservative counting approach; i.e. not counting verbal estate gift commitments)
- Explored ballot initiatives (polling) and determined timing not right
- Helped defeat 60, 61, 101
- We led effort to develop fair funding formula for CCHE
- Garnered ability to enroll more international and non-resident students (Flexibility Legislation)
- Instituted millions of dollars in strategic budget cuts
- Sold Given for \$13.8 million; directed funds to School of Medicine needs
- 9th and Colorado under contract (\$34.8 million)
- Returned CUREF to CU Foundation, engaging key volunteers to assist with campus real estate decisions and achieving operational efficiencies
- Secured \$5 million gift/partnership with Pinnacol for UCD Risk Management/Insurance program
- Completed sale of UPI building to VA
- Reached operational milestones on ISIS project
- Articulated improved method for counting grants and contracts funding (Foundation/research funding)
- Eliminated \$1.1 million structural deficit in system administration ICCA budget
- Fixed problems with CeDAR in consultation with Philip Anschutz

Efficiency enhancements

- Promoted and successfully lobbied legislation for efficiencies in past three legislative sessions
- Streamlined number and length of policies through Task Force on Efficiency and developed web-based tracking/presentation system

- Reduced legal costs
- Built framework for move to self-insurance, which will save an estimated \$3-4 million annually
- Completed dependent audit, saving \$2.3 million
- Consolidated operations in system administration, achieving savings and efficiencies
- Restructured FRA Board for greater effectiveness

Meeting CU's Mission

- Successfully completed re- accreditation for UCB and UCD
- Protected CU on HESP study
- Helped develop and promote CU Guaranteed (community college transfer)
- Completed first phase of statewide articulation agreements (seven agreements)
- Completed moms and babies agreement with The Children's Hospital and University of Colorado Hospital
- Completed affiliation agreement with The Children's Hospital
- Developed and implemented Boettcher/Webb Waring biomedical grant program (averting lawsuit and creating \$40 million endowment)
- Administratively restructured journalism education at UCB
- Funded School of Medicine Scholarships for minority students, more than tripling diverse enrollment
- Contributed to development of mission/guiding principles
- Promoted innovative, national model learning and teaching programs (Learning Assistants/clickers)
- Developed partnership with Denver Scholarship Foundation
- Fixed problems with Reisher Scholars program at UCD

Ongoing

Image, Reputation and Public Confidence in Higher Education

- Continually work to enhance reputation of CU and higher education
- Host outreach events in Colorado and nationally for alumni, donors, business/community leaders, media
- Promote university through earned media (op-eds, etc.)
- Actively manage media stories for maximum positive impact and minimal negative impact
- Expanded President's Newsletter in frequency (now monthly) and distribution (from 80,000 to 265,000)
- Focused on internal communication, particularly relating to budget
- Conduct frequent media tours/visits with editorial board, TV news directors, etc.
- Serve as primary spokesperson for Colorado higher education, particularly in media and at legislature
- Address problems immediately before they become negative PR issues
- Addressing issues related to publicity surrounding School of Dental Medicine

Institutional Culture of cooperation and coordination (internal and external)

- Actively work to eliminate perceptions of CU arrogance
- Conduct twice-yearly campus town hall meetings
- Promote culture of cooperation internally and externally
- Work to improve our relationship with University of Colorado Hospital and The Children's Hospital
- Create shared services approach, internally and with colleague higher education institutions
- Promote economic development opportunities, particularly in cities that are home to CU campuses
- Thoroughly communicate with Board of Regents (weekly, informally and on as-needed basis)
- Collaborate with colleague higher education institutions on academic and/or finance partnerships
- Build partnership with Conoco Phillips
- Engage VA in partnerships (research/medical; transportation/facilities)
- Improve relationships with boards of University Hospital, The Children's Hospital
- Build public/private partnerships (GEM, Pinnacol, etc.)

Finance/comprehensive campaign/funding streams

- Continually implement strategic budget cuts
- Frequently meet with current and potential donors
- Host donor events at home
- Build endowment toward appropriate levels

Efficiency enhancements

- Ongoing work of Task Force for Efficiency
- Examine classroom utilization
- Continue implementation of ISIS
- Compile all lists of key university constituents
- Improve currency and quality of information in Advance database (primary CU database)

Meeting CU's Mission

- Invest in institutional financial aid (\$38 million to \$117 million)
- Recruit more international students, enhancing campus environments and CU's international scope
- Promote and expand online education
- Continually examine and modify core curriculum
- Enhance relationship with CCHE
- Examine and adjust faculty workload
- Enhance diversity in all its forms (ethnic, socioeconomic, political, etc.)
- Examine and improve class availability
- Continually review tenure and post-tenure review
- Expand pre-collegiate programs
- Expand Trio program
- Increase involvement in Teach for America
- Increase outreach to middle and high schools
- Continue to engage President's Teaching Scholars in innovative teaching approaches

In Progress

Image, Reputation and Public Confidence in Higher Education

- Create and implement advocacy program
- Expand use of social media to engage key constituents
- Improve quality and currency of data in Advance
- Expand number of alumni, donor, friends records in advance
- Expand Mini-med school model to other key areas (law, business, etc.)
- Engage with existing external structures such as Café Scientifique
- Market Anschutz Medical campus and FRA
- Complete gateway entrance to Anschutz Medical Campus
- Complete wayfinding interior to Anschutz Medical Campus
- Addressed looming issues related to publicity surrounding School of Dental Medicine

Institutional Culture of cooperation and coordination (internal and external)

- Develop committee to facilitate research partnerships, particularly between UCB and AMC
- Add programs to statewide articulation agreements
- Complete restructure of FRA board and hire new executive director
- Work with City of Denver in purchase of Police Building for UCD programs (this issue is in process and currently confidential)
- Increase Washington, D. C. lobbying effort (potentially in conjunction with governor)
- Work with various entities at Anschutz Medical Campus to help ensure FasTracks funding
- Engage business and education partners in “Research Diamond” concept
- Work with city of Boulder and developers on UCB conference center (this issue is in process and currently confidential)
- Further engage USOC in Olympic partnerships
- Become involved with Western Governors University

Finance/comprehensive campaign/funding streams

- Complete sale of 9th and Colorado
- Explore four-year tuition guarantee for resident students
- Revise campus strategic plans again to reflect current funding realities
- Determine appropriate funding solutions for Anschutz Medical Campus programs
- Work with Congressional delegation to secure last \$23-26 million for completion of I-225 expansion

Efficiency enhancements

- Complete departmental studies, with focus on sources and uses, workloads, class size, etc.
- Expand use of Cisco Telepresence
- Complete UCB athletics study with Creative Artists Agency

Meeting CU's Mission

- Contribute to Regents' discussion on presidential succession plan
- Complete UCD Business School renovation
- Encourage fundraising for Conservative Chair
- Continue to bring together facility and program components for CIMB
- Address restructuring of UCB/UCD Architecture programs
- Expand community college concurrent enrollment programs at UCD
- Revise Anschutz Medical Campus master plan
- Ensure successful re-accreditation for School of Medicine

To Do

Image, Reputation and Public Confidence in Higher Education

- Explore expanded use of online communities for alumni, donors, faculty, students

Institutional Culture of cooperation and coordination (internal and external)

- Examine effectiveness of engineering program with Mesa
- Explore historic building designation for Building 500 and attendant funding possibilities
- Examine “grow your own” high-level leadership program

Finance/comprehensive campaign/funding streams

- Consider role of hospitals in funding AMC programs (Confidential at this point)
- Consider other alternative funding sources for AMC programs
- Continue to consider ballot initiative possibilities

Efficiency enhancements

- Combine departments, schools
- Consider program elimination
- Determine effective use of UCB south campus
- Explore role of merit pay system
- Examine remediation programs
- Consider use of iTunes U
- Improve course availability

Meeting CU's Mission

- Continually review tenure processes
- Package and market ways high school students can get a leg up on college (AP, IB, CU Succeed, etc.)
- Examine academic rigor
- Improve advising
- Explore grade inflation
- Improve graduation rates
- Examine graduation requirements
- Identify problem faculty and students by department
- Increase minority hires
- Conduct faculty exit interviews
- Evaluate year-round education
- Increase test-out options
- Track employment of graduates more thoroughly

Self-evaluation

FY 2012



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

TO: University of Colorado Board of Regents
FROM: Bruce Benson
RE: Self-evaluation
July 14, 2012

Dear Regents,

Below you will find my self-evaluation for 2011-12. As in previous years, the list below is in bullet-point format (divided by status of project and area of focus) to make it easier for you to digest. I would be happy to elaborate on any of the points. Some cut across categories and could be mentioned in multiple sections, but I have put them where I think they are most pertinent.

As you know, we deal with many issues on a daily basis that may not make the list but are important nonetheless. I would say that some of the most significant issues now on our plate are hospital affiliations/negotiations, transportation, academic effectiveness, funding streams and examining new and alternative delivery methods for higher education. One thing I know is of interest to you is succession planning. It is always of interest to me as well. As we saw with some key transitions this year, much of that is driven by timing, the position, and potential people available. While I do not keep a list of candidates for any one position, I am continually thinking about people and positions.

As I have maintained, we have an excellent team in place. People are committed and hard working, and I am proud of the work we are doing. I look forward to a conversation with you about our collective work, and I also look forward to working with you over the coming year to continue to move CU forward.

Completed Items

Image, Reputation and Public Confidence in Higher Education

- Launched accountability website with a variety of reports/data related to budget, workload, salaries, etc.
- Completed first round of Pac-12 outreach with alumni/parent events and donor meetings in Seattle, Los Angeles, San Francisco, Phoenix.
- Completed renovation of UCD Business School Building (grand opening in August; will open 100 percent full) and opened JP Morgan Commodities Trading Center at UCD.

- Opened \$15 million Anschutz Health and Wellness Center at CU Anschutz Medical Campus.
- Dedicated Skaggs School of Pharmacy at CU Anschutz Medical Campus.
- Passed \$1 million in fundraising for Chair in Conservative Thought and Policy, established external/internal advisory board, began search for chair.
- Successfully launched CU Advocates program (1,800 members and counting).
- Successfully launched additional social media initiatives for Office of the President and system administration
- Increased frequency of President's Newsletter (electronic) from bi-monthly to monthly
- Partnered with Senator Udall and Colorado Mesa University on Colorado Capitol Conference in Washington, D.C.
- Completed Economic Impact Study and successfully promoted results.
- Pressed university's case for fair and balanced coverage with leadership of Media Newsgroup (Dean Singleton)
- Collaborated with Boulder campus to substantially limit 4/20 event.
- Completed new institutional TV commercial geared to Pac-12 entry.

Institutional culture of cooperation and coordination (internal and external)

- Successfully managed key transitions in leadership team (Don Elliman, Patrick O'Rourke, Kelly Fox, Todd Saliman, Rick Lawrence)
- Worked with Chancellor DiStefano to facilitate leadership changes on cabinet (Kelly, Ric Porreca, Joey White, Jeff Lipton).
- Hosted series of receptions at our home for legislators
- Hosted breakfast meeting with Joint Budget Committee members
- Had meetings with governor and Denver mayor on issues of common interest
- Collaborated with Boulder campus, key donor, CU Foundation and external agency to enhance UCB athletic department operations and fundraising capacity.
- Engaged with new Mayor Steve Hogan and continued to improve relationship with City of Aurora
- Strengthened relationship with Aurora Economic Development Council
- Partner with various entities to promote Complete CU and Complete College Colorado
- Deepened CUREF's engagement with campus land/real estate activities.
- Increased funding to successful pre-collegiate programs.
- Added new articulation agreements with community colleges.
- Collaborated with President's Teaching Scholars to create mid-career faculty mentorship program.
- Collaborated on system-side CU Women Succeeding Symposium (Marcy Benson, keynote speaker), which drew record attendance.
- Successfully consolidated system administration functions at 1800 Grant, increasing operational efficiency and leading to savings.

- Secured legislation (HB 1350) in collaboration with Board of Regents to extend benefits for family of active-duty military personnel.
- Implemented employee dependent-tuition program.
- Successfully collaborated with local and national elected officials and economic development groups to promote Denver as site of satellite US Patent Office.
- Developed working relationship with Mayor Bach of Colorado Springs.

Finance/comprehensive campaign/funding streams

- Continued to post fundraising results that rank among top years in university history (final numbers for FY 11 to come week of 7/16)
- Passed \$1.17 billion in Creating Futures campaign.
- Successful completed leadership transition at CU Foundation.
- Mitigated state cuts to higher education (from \$60 million originally proposed to \$11.8 million).
- Developed framework to engage firm to enhance operations of CU Foundation. (Firm should be selected before August)
- Explored ballot initiatives (polling) and determined timing not right
- Led effort to develop fair funding formula for all of higher education implemented by CCHE
- Enrolled more international and non-resident students as a result of Flexibility Legislation
- Hired lead federal relations staffer to work agencies in Washington, D. C. (Abby Benson)
- Instituted millions of dollars in strategic budget cuts
- Completed sale of Given, bulldozed site, directed funds to School of Medicine.
- Completed purchase of Trembly property in Colorado Springs.
- Reached operational milestones on ISIS project

Efficiency enhancements

- Implemented CU Health and Welfare Trust, which kept health-care cost increases below national averages and averages of Colorado public higher education institutions
- Consolidated operations in system administration, achieving savings and efficiencies
- Reduced university policies from 210 (March 2008) to 89 and cut number of pages by more than half
- Restructured operations of UIS and hired new leadership
- Restructured FRA Board for greater effectiveness and hired new executive director from Mayo Clinic
- Completed external security audit of CU.edu

Meeting CU's Mission

- Implemented CC to CU community college transfer agreement between UCD and metro area community colleges
- Continued to add to statewide articulation agreements
- Developed cooperative agreement to fund endowment for \$2 million endowed chair for Boettcher/Webb Waring biomedical grant program
- Drafted university vision statements for Board of Regents consideration
- Collaborated on development of hospital joint operating agreement to form University of Colorado Health.
- Collaborated on efforts to include Memorial Hospital in University of Colorado Health
- Secured accreditation for School of Pharmacy

Ongoing

Image, Reputation and Public Confidence in Higher Education

- Continually work to enhance reputation of CU and higher education
- Host outreach events in Colorado and nationally for alumni, donors, business/community leaders, media
- Promote university through earned media (op-eds, etc.)
- Actively manage media stories for maximum positive impact and minimal negative impact
- Expanded President's Newsletter in frequency (now monthly) and distribution (from 80,000 to 280,000)
- Focused on internal communication, particularly relating to budget
- Conduct frequent media tours/visits with editorial board, TV news directors/station managers, etc.
- Serve as primary spokesperson for Colorado higher education, particularly in media and at legislature
- Address problems immediately before they become negative PR issues
- Continued successful implementation of branding project, enhancing CU's efforts to be efficient, consistent and coordinated in how it presents itself.
- Continued successful implementation of eCommunication program (Harris), allowing university to communicate better with constituents and to gather better data.
- Launched project to enhance function and presentation of CU.edu website (Office of the President/system administration)
- Enhance advocacy program (1,800 advocates and counting)
- Expand use of social media to engage key constituents
- Improve quality and currency of data in Advance
- Expand number of alumni, donor, friends records in advance
- Joined nine other universities in pilot program with LinkedIn

Institutional Culture of cooperation and coordination (internal and external)

- Foster culture of cooperation across campuses, higher education partners, business, communities
- Actively work to eliminate perceptions of CU arrogance
- Conduct annual campus town hall meetings
- Promote culture of cooperation internally and externally
- Work to improve our relationship with University of Colorado Hospital and The Children's Hospital
- Create shared services approach, internally and with colleague higher education institutions
- Promote economic development opportunities, particularly in cities that are home to CU campuses
- Thoroughly communicate with Board of Regents (weekly, informally and on as-needed basis)
- Collaborate with colleague higher education institutions on academic and/or finance partnerships
- Improve relationships with boards of University Hospital, The Children's Hospital
- Build public/private partnerships (GEM, Pinnacol, JP Morgan Chase, etc.); exploring partnership currently with Halliburton
- Launched Be Colorado, comprehensive employee wellness initiative.
- Engage mayors and other elected officials in communities where CU has presence

Finance/comprehensive campaign/funding streams

- Continue legislative efforts to allow for more efficiency
- Continually implement strategic budget cuts
- Frequently meet with current and potential donors
- Host donor events at home
- Build endowment toward appropriate levels.
- Resolved several outstanding PERA cases with individual employees and added resources to continue to address issue.
- Continued to engage CUREF and key volunteers to assist with campus real estate decisions and achieving operational efficiencies
- Increase Washington, D. C. lobbying effort, targeting federal funding agencies

Efficiency enhancements

- Ongoing work of Task Force for Efficiency
- Examine classroom utilization

- Continue implementation of ISIS
- Compile all lists of key university constituents
- Improve currency and quality of information in Advance database (primary CU database)
- Worked with faculty to facilitate increased teaching and advising loads.
- Launched CU Marketplace (outgrowth of flexibility legislation), resulting in greater purchasing efficiencies

Meeting CU's Mission

- Invest in institutional financial aid (\$38 million to more than \$120 million)
- Recruit more international students, enhancing campus environments and CU's international scope
- Promote and expand online education
- Continually examine and modify core curriculum
- Continue to work to enhance relationship with CCHE and participate in state planning efforts
- Examine and adjust faculty workload
- Enhance diversity in all its forms (ethnic, socioeconomic, political, etc.)
- Examine and improve class availability
- Continually review tenure and post-tenure review
- Expand pre-collegiate programs
- Expand Trio program
- Increase involvement in Teach for America
- Increase outreach to middle and high schools
- Continue to engage President's Teaching Scholars and other key groups in innovative teaching approaches.
- Enhanced facilities on all campuses and directed increased resources to controlled maintenance
- Launched retooled BioFrontiers program and opened facility

In Progress

Image, Reputation and Public Confidence in Higher Education

- Expand Mini-med school model to other key areas (law, business, etc.)
- Engage with existing external structures such as Café Scientifique
- Market Anschutz Medical campus and FRA
- Continue sign initiative and gateway entrance to Anschutz Medical Campus
- Complete wayfinding interior to Anschutz Medical Campus
- Master Plan AMC

Institutional Culture of cooperation and coordination (internal and external)

- Facilitate work of committee to increase research partnerships, particularly between UCB and AMC, and to monetize intellectual property
- Add programs to statewide articulation agreements
- Work with various entities at Anschutz Medical Campus to promote FasTracks recommendation on completing I-225 line
- Work with CUREF, city of Boulder and developers on UCB conference center (this issue is in process and currently confidential)
- Further engage USOC in Olympic partnerships at UCCS
- Continued efforts to secure effective transportation solutions (highway, BRT, FasTracks), particularly as they relate to I-225, US 36
- Engaged statewide veterans groups in I-225 transportation issues.

Finance/comprehensive campaign/funding streams

- Actively work with developers and city of Denver to sell 9th and Colorado site.
- Explore four-year tuition guarantee for resident students
- Continue to examine campus strategic plans to reflect current funding realities
- Determine appropriate funding solutions for Anschutz Medical Campus programs
- Facilitate cross-campus committee to increase CU's efforts to monetize intellectual property
- Work to coordinate international student efforts cooperatively with all campuses
- Study all outreach programs to determine where best to allocate funding

Efficiency enhancements

- Departmental studies, with focus on sources and uses, workloads, class size, etc.
- Expand use of Cisco Telepresence
- Improve efficiency of UCB athletics program
- Explore more efficient and cost-effective student health insurance options.
- Engage mentor for executive team members
- Launch leadership development program for mid-level professionals
- Institute health and wellness program for system administration in cooperation with Jim Hill
- Examine effectiveness of diversity programs and allocate resources to effective programs
- Redefined UIS reporting relationship and began seeking efficiencies with shared IT services across system
- Improved information security with e-discovery process improvements (HR and University Counsel)
- Complete and implement a new compensation structure for exempt professionals

Meeting CU's Mission

- Continue to bring together facility and program components for Biofrontiers
- Implement restructuring of UCB/UCD Architecture programs
- Explore additional community college concurrent enrollment programs at UCD
- Ensure successful implementation of University of Colorado Health and explore additional affiliations

To Do

Image, Reputation and Public Confidence in Higher Education

- Expand use of online communities for alumni, donors, faculty, students

Institutional Culture of cooperation and coordination (internal and external)

- Examine effectiveness of engineering program with Mesa, particularly with classes now graduating

Finance/comprehensive campaign/funding streams

- Consider role of hospitals in funding AMC programs (Confidential at this point)
- Consider other alternative funding sources for AMC programs

Efficiency enhancements

- Combine departments, schools
- Consider program elimination
- Determine effective use of UCB south campus
- Explore role of merit pay system
- Examine remediation programs
- Consider online and other alternative delivery methods

Meeting CU's Mission

- Develop ways to consolidate CU statewide activities to better market university
- Continually review tenure processes
- Package and market ways high school students can get a leg up on college (AP, IB, CU Succeed, College in Colorado etc.) Increase test-out options. Increase awareness of opportunities
- Examine academic rigor
- Improve advising

- Explore grade inflation
- Improve graduation rates
- Examine graduation requirements
- Identify problem faculty and students by department
- Increase minority hires
- Conduct faculty exit interviews
- Evaluate year-round education
- Track employment of graduates more thoroughly
- Why a person didn't receive tenure

Self-evaluation

FY 2013



TO: University of Colorado Board of Regents
FROM: Bruce Benson
RE: Self-evaluation
July 12, 2013

Dear Regents,

Below you will find my self-evaluation for 2012-13. As I have done in the past, I am outlining my activities in key areas of focus and arranging them as completed items, those that are ongoing and those in progress. I am also attaching last year's self evaluation as a point of reference in case you want to refer to some of the things we have completed. I know we will have a deeper conversation about this at your retreat, but to me the key question about my performance is "How is the university running?" In my estimation, we are doing quite well given the challenges we face. This document details some of the successes we are having. I say "we" because this is a team effort among you, the team at system administration, the campuses and me. I'm proud of the work we're doing and look forward to continuing it, as well as to take on some new initiatives I will discuss with you next week.

Completed Items

Image, Reputation and Public Confidence in Higher Education

- Extended distribution of President's monthly electronic newsletter from 250,000 to 315,000.
- Promoted major gifts/partnerships
- Engaged with leadership of Phillips 66 regarding Biofrontiers partnership
- Publicly addressed shortcomings in College Measures report
- Promoted CU's latest Nobel Prize winner and MacArthur winner as part of efforts to demonstrate university's academic quality (wrote in newsletter; presented in speeches)
- Worked with campus/system team to address public issues around Aurora Theater shooting and engaged external firm to assess university response, policies, practices
- Positioned CU to secure National Alzheimer's Center designation by promoting work of Dr. Huntington Potter and team
- Promoted "Funding in Focus" forums through the CU Advocates program
- Collaborated with Boulder campus to substantially limit 4/20 event, which had virtually nobody show up and attracted minimal press coverage

Institutional culture of cooperation and coordination (internal and external)

- Successfully completed transition of 140 fundraisers from CU Foundation to university (including all HR-related issues)
- Kicked off initiative to improve CU's research operation (to improve policies and operations, diversify partner base to include more business/industry and philanthropic entities and maximize return on intellectual property) by bringing together campus leaders and moving Dr. Laura Simon to system administration to oversee enterprise
- Worked with executive staff to complete CCHE master planning process and performance contracts
- Engaged international counsels through outreach event
- Established System Task Force on New Technologies to explore increased and enhanced use of technology in learning and teaching
- Entered into contract with Coursera for CU-Boulder and for CU system
- Successfully managed personnel transition on Design Review Board
- Engaged with internal/external team to ensure successful election regarding affiliation of Memorial Hospital in Colorado Springs with CU Health
- Managed Memorial Hospital employee integration with the CU Health Plan.
- Hosted receptions at our home for legislators
- Hosted breakfast meeting with Joint Budget Committee members
- Had meetings with governor and Denver mayor on issues of common interest
- Collaborated with Boulder campus, key donor, CU Foundation and external agency to enhance UCB athletic department operations and fundraising capacity.
- Engaged with Aurora Mayor Steve Hogan and continued to improve relationship with City of Aurora, FRA, RTD and Aurora Economic Development Council
- Deepened CUREF's engagement with campus land/real estate activities.
- Successfully consolidated system administration functions at 1800 Grant, increasing operational efficiency and leading to savings.
- Furthered working relationship with Mayor Bach of Colorado Springs.

Finance/comprehensive campaign/funding streams

- Continued to post fundraising results that rank among top years in university history (final numbers for FY 13 to come week of 7/22), but concurrently working to substantially increase fundraising and endowment through Foundation restructuring
- Passed \$1.44 billion toward \$1.5 billion goal for Creating Futures campaign.
- Successfully worked with legislators to secure \$30 million general fund increase and \$5 million in state financial aid increase (for all higher education)
- Successfully worked with legislators to secure \$142 million increase in capital construction (CU's share is \$21 million; projects include CU-Boulder Biotech building, UCCS Performing Arts A&E, Auraria Library)

- Successfully worked with legislators to secure additional \$9 million (CU's share -- \$3 million) in FY 2012-13 budget
- Successfully worked with legislators to redirect \$500,000 to Innovative Higher Education Research Grant fund
- Sold and closed on portion of 9th and Colorado property
- Worked with CCHE to stop wasting time discussing performance funding (that will kick in after state funding goes from current \$5xx million to projected \$70x million) that state will never be able to fund

Efficiency enhancements

- Implemented CU Health and Welfare Trust, which kept health-care cost increases below national averages and averages of Colorado public higher education institutions
- Ensured rates for CU health plan that reduced annual rate increase to 3.8 percent (from 5.5 percent in previous year), resulting in all CU employees either experiencing a rate decrease or no change from previous year
- Kept administrative costs of CU Health and Welfare Trust at 7.5 percent of total budget (compared with 20 percent allowable by federal guidelines)
- Restructured Employee Services to ensure staffing for CU Health and Welfare Trust
- Engaged CUREF in sales of CU properties that are low-value to the university
- Consolidated operations in system administration, achieving savings and efficiencies
- Reduced university policies from 210 (March 2008) to 89 and cut number of pages by more than half
- Kept administrative overhead to 44 percent below national average
- Worked with faculty and campuses to get faculty to teach and advise more for minimal additional compensation
- Instituted efficiencies at system administration as result of work of Task Force on Efficiency
- Task Force on Efficiency followed up with campuses to examine progress; most campus recommendations implemented, refining final list

Meeting CU's Mission

- Developed cooperative agreement to fund endowment for \$2 million endowed chair for Boettcher/Webb Waring biomedical grant program
- Stabilized UCD/AMC leadership by naming permanent chancellor
- Completed CCHE master planning process and performance contracts (and convinced DHE leadership the process wasted considerable time, more than \$1 million for CU by our estimates)

- Contracted with Phil Goldstein (academic technology consultant) to help system develop strategic plan for online education that meshes with and supports the work being done on campuses
- Hired Deborah Keyek-Franssen as AVP for Digital Education and Engagement, who will facilitate campus work and increase CU's online presence nationally and internationally
- Began construction on new academic building at UCD
- Began construction on Lane Center at UCCS
- Hired Chair of Conservative Thought at UCD
- Improved enrollment in Western Civilization program from zero to 15 currently working toward certificate; working to increase numbers in coming years

Ongoing

Image, Reputation and Public Confidence in Higher Education

- Continually work to enhance reputation of CU and higher education
- Host outreach events in Colorado and nationally for alumni, donors, business/community leaders, media
- Promote university through earned media (op-eds, etc.)
- Actively manage media stories for maximum positive impact and minimal negative impact
- Expanded President's Newsletter in frequency (now monthly) and distribution (from 80,000 to 315,000)
- Focused on internal communication, particularly relating to budget
- Conduct frequent media tours/visits with editorial board, TV news directors/station managers, etc.
- Serve as primary spokesperson for Colorado higher education, particularly in media and at legislature
- Address problems immediately before they become negative PR issues
- Continued successful implementation of branding project, enhancing CU's efforts to be efficient, consistent and coordinated in how it presents itself
- Continued successful implementation of eCommunication program, allowing university to communicate better with constituents and to gather better data (new RFP out)
- Enhance advocacy program (nearly 2,300 advocates and counting)
- Expand use of social media to engage key constituents
- Improve quality and currency of data in Advance
- Expand number of alumni, donor, friends records in advance
- Joined nine other universities in pilot program with LinkedIn and successfully mined data for events

Institutional Culture of cooperation and coordination (internal and external)

- Partner with RTD, CDOT, US 36 commuting solutions, mayors, municipalities and businesses to ensure effective transportation network to serve campuses and region
- Working to establish partnership with Colorado Health Foundation in statewide health initiative
- Foster culture of cooperation across campuses, higher education partners, business, communities
- Actively work to eliminate perceptions of CU arrogance
- Conduct town hall meetings on each campus
- Promote culture of cooperation internally and externally
- Work to improve our relationship with University of Colorado Hospital and Children's Hospital Colorado
- Create shared services approach, internally and with colleague higher education institutions
- Promote economic development opportunities, particularly in cities that are home to CU campuses
- Thoroughly communicate with Board of Regents (weekly, informally and on as-needed basis)
- Collaborate with colleague higher education institutions on academic and/or finance partnerships
- Improve relationships with boards of University Hospital, Children's Hospital Colorado
- Build public/private partnerships (GEM, Pinnacol, JP Morgan Chase, Conoco.); exploring partnership currently with Halliburton
- Continued growth of Be Colorado, comprehensive employee wellness initiative.
- Engage mayors and other elected officials in communities where CU has presence

Finance/comprehensive campaign/funding streams

- Enhance operations of CU fundraising efforts in conjunction with GG+A and completed transition of first round of fundraisers to campuses
- Improve athletics fundraising
- Examine outsourcing in select areas
- Continue legislative efforts to allow for more efficiency
- Continually implement strategic budget efficiencies
- Frequently meet with current and potential donors
- Host donor events at home
- Build endowment toward appropriate levels
- Continued to engage CUREF and key volunteers to assist with campus real estate decisions and achieving operational efficiencies
- Increase Washington, D. C. lobbying effort, targeting federal funding agencies

Efficiency enhancements

- Ongoing work of Task Force for Efficiency
- Examine classroom utilization
- Continue implementation of ISIS
- Compile all lists of key university constituents
- Improve currency and quality of information in Advance database (primary CU database)
- Worked with faculty to facilitate increased teaching and advising loads.

Meeting CU's Mission

- Ensure appropriate representation on University of Colorado Hospital Board and University of Colorado Health board
- Ensure effective operation and engagement of FRA
- Invest in institutional financial aid (\$38 million to more than \$128 million)
- Recruit more international students, enhancing campus environments and CU's international scope
- Promote and expand online education
- Continually examine and modify core curriculum
- Continue to work to enhance relationship with CCHE and participate in state planning efforts
- Examine and adjust faculty workload
- Enhance diversity in all its forms (ethnic, socioeconomic, political, etc.)
- Examine and improve class availability
- Continually examine tenure and post-tenure review
- Expand pre-collegiate programs
- Continue to engage President's Teaching Scholars and other key groups in innovative teaching approaches.
- Enhanced facilities on all campuses and directed increased resources to controlled maintenance

In Progress

Image, Reputation and Public Confidence in Higher Education

- Conduct scientific polling to gauge electorate's interest in supporting higher education
- Implement CU for Colorado initiative to demonstrate university's reach and value in state
- Market CU Anschutz Medical Campus, FRA and partner hospitals in cooperative effort

- Building gateway entrance to Anschutz Medical Campus and implement sign initiative on perimeter entrances
- Hired vendor to facilitate project to enhance function and presentation of CU.edu website (Office of the President/system administration)
- Master Plan AMC

Institutional Culture of cooperation and coordination (internal and external)

- Engage vendor to increase research partnerships (current research funding sources are 80% federal, 10% industry and 10% private; aim is to have more industry/private), particularly between UCB and AMC, improve research processes and infrastructure and maximize return on intellectual property
- Fully implement transition of CU Foundation and fundraising operation
- Add programs to statewide articulation agreements
- Work with various entities at Anschutz Medical Campus to promote FasTracks recommendation on completing I-225 line and successfully engaged RTD board to move FasTracks line to northeast and not along Montview
- Work with CUREF, city of Boulder and developers on UCB conference center (this issue is in process and currently confidential)
- Further engage USOC in Olympic partnerships at UCCS
- Continued efforts to secure effective transportation solutions (highway, BRT, FasTracks), particularly as they relate to I-225, US 36
- Engaged statewide veterans groups in I-225 transportation issues
- Worked with partners in Colorado Springs to continue improvements on North Nevada
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Finance/comprehensive campaign/funding streams

- Actively work with developers and city of Denver to sell remainder of 9th and Colorado site and include old UCH in parcel
- Explore four-year tuition guarantee for resident students
- Continue to examine campus strategic plans to reflect current funding realities
- Determine appropriate funding solutions for Anschutz Medical Campus programs
- Facilitate cross-campus committee to increase CU's efforts to monetize intellectual property
- Work to coordinate international student efforts cooperatively with all campuses

Efficiency enhancements

- Departmental studies, with focus on sources and uses, workloads, class size, etc.
- Expand use of Cisco Telepresence
- Improve efficiency of UCB athletics program

- Engaged mentor for executive team members
- Launch leadership development program for mid-level professionals
- Institute health and wellness program for system administration in cooperation with Jim Hill
- Examine effectiveness of diversity programs and allocate resources to effective programs/
- Redefined UIS reporting relationship and began seeking efficiencies with shared IT services across system
- Improved information security with e-discovery process improvements (HR and University Counsel)
- Complete and implement a new compensation structure for exempt professionals

Meeting CU's Mission

- Continue to bring together facility and program components for Biofrontiers
- Assess CU's online degree/program offerings and determine most effective use of Coursera platform
- Work to secure designation as National Alzheimer's Center
- Explore additional community college concurrent enrollment programs at UCD
- Ensure successful implementation of University of Colorado Health and explore additional affiliations

To Do

Image, Reputation and Public Confidence in Higher Education

- Poll graduates and CEOs for comprehensive study of where alumni get jobs and what CEOs look for in graduates
- Conduct climate survey
- Expand use of online communities for alumni, donors, faculty, students

Institutional Culture of cooperation and coordination (internal and external)

- Plan shuttle service on Anschutz Medical Campus
- Complete negotiations with US Army on outstanding Fitzsimons/FRA issues
- Examine effectiveness of engineering program with Mesa, particularly with classes now graduating

Finance/comprehensive campaign/funding streams

- Study outsourcing possibilities

- Examine and close loopholes in non-resident tuition classification
- Work to sell remainder of 9th and Colorado property
- Consider role of hospitals in funding AMC programs (Confidential at this point)
- Consider other alternative funding sources for AMC programs

Efficiency enhancements

- Combine departments, schools
- Consider program elimination
- Determine effective use of UCB south campus
- Explore role of merit pay system
- Examine remediation programs
- Consider online and other alternative delivery methods

Meeting CU's Mission

- Conduct strategic planning for CU version of Hoover Institute
- Explore possibilities for personalized medicine and promote
- Continually review tenure processes
- Package and market ways high school students can get a leg up on college (AP, IB, CU Succeed, College in Colorado etc.) Increase test-out options. Increase awareness of opportunities
- Examine academic rigor
- Improve advising
- Explore grade inflation
- Improve graduation rates
- Examine graduation requirements
- Identify problem faculty and students by department
- Increase minority hires
- Conduct faculty exit interviews
- Evaluate year-round education
- Track employment of graduates more thoroughly
- Why a person didn't receive tenure



University of Colorado
Long-term Objectives and Projects
July 19, 2013

- Work to secure funding for the University of Colorado from sources including state, public/private partnerships and potential ballot initiative(s), fundraising, international students and closing non-residents becoming residents loopholes.
- Complete reorganization of all advancement operations.
- Enhance research operation by diversifying funding base (to include more business/industry/private support), reorganizing research infrastructure and support programs, and maximizing return on intellectual property.
- Strategically align online degree/certificate/course offerings, including those using Coursera platform, so university meets the imperatives of how technology is revolutionizing education.
- Market the entire university by coordinating efforts across campuses and system administration and leveraging such efforts as CU Advocates, CU for Colorado (outreach), intercollegiate athletics marketing; further related effort to greatly increase current and accurate data in master database (currently 315,000 good records; vendor engaged to find tens of thousands more)
- Complete restructuring of UCB Athletics (leadership, facilities, budget)
- Advance personalized medicine initiative at Anschutz Medical Campus, which uses an individual's genetic code to tailor medicine/treatment/therapy for a variety of health issues.
- Ensure hospitals are operating a maximum efficiency by implementing effective governance, addressing issues at Memorial and reducing costs at Poudre.
- Lead statewide health and wellness initiative by bringing CU health/wellness assets (Anschutz Health and Wellness Center/Jim Hill, Be Colorado, School of Public Health, etc.) to bear in partnership with similar efforts (Colorado Health Foundation, Michele Obama initiative, Live Well Colorado, etc.).
- Continue forward progress of FRA, address naming issue and development of biosciences park.
- Implement version of Stanford's Hoover Institute on CU-Boulder campus.
- Continue realizing efficiencies, securing legislation that improves operations and revenues.
- Examine academic and administrative programs with an emphasis on prioritization and multi-year budget forecasting.

**PRESIDENT
UNIVERSITY OF COLORADO
JOB DESCRIPTION**
[Approved by the Board of Regents on November 29, 2007]

The University of Colorado, as provided by the state constitution, is governed by a publicly-elected, nine-member Board of Regents. State statutes provide that the Board of Regents have general supervision of the university, and control and direction of all funds of and appropriations to the university. The University of Colorado is also known as the “University of Colorado System” and is composed of ~~three~~ four campuses: The University of Colorado ~~at~~ Boulder; the University of Colorado ~~at~~ Denver, ~~and Health Sciences Center~~ the University of Colorado Anschutz Medical Campus; and the University of Colorado ~~at~~ Colorado Springs. These campuses have separate and distinct roles and missions serving different markets.

As provided by the state constitution and law, the regents of the university elect the president of the university who serves at the pleasure of the board. The president is the principal executive officer of the university, ~~a member of the faculty and carries out the policies and programs established by the Board of Regents~~ and a member of the faculty.

The Office of the President serves the Board of Regents by insuring that its directives and policies are carried out. The Office of the President is also responsible for staff ~~coordination in~~ who support ~~of~~ the Board of Regents in their role as elected officials on all financial, logistical and communications issues.

The *Laws of the Regents* provide that, as the principal executive officer, the president is responsible for the administration of the university and for compliance of university matters with applicable Regent *Laws* and policies, and state and federal constitutions, laws, and regulations. Regent *Laws* also provide that the president is the chief academic officer of the university, responsible for providing academic leadership for the university in meeting the needs of the state, and ~~in~~ maintaining and advancing the academic policies of the university.

In light of these constitutional, statutory, and regent policy requirements:

- The president of the University of Colorado reports to the Board of Regents. Reporting directly to the president are the vice presidents and the campus chancellors.
- The president ~~will~~ provides leadership for the university and ~~be~~ is an advocate for higher education in Colorado.
- The president is responsible for carrying out the policies and programs established by the Board of Regents, ~~for~~ bringing recommendations to the attention of the board to keep it fully informed in meeting its policy-making responsibilities, and providing support for the Board of Regents in their role as elected officials. Therefore, the president is expected to:
 1. Bring recommendations to the board for their consideration in making major policy decisions with appropriate staff work that provides reasonable alternatives.
 2. Ensure a timely response to all queries of the administration made by members of the board.

3. Promote the recognition and the public representational opportunities of the chancellors, consistent with their responsibilities.
4. Develop specific goals and objectives for the chancellors.
5. Provide [staff coordination leadership](#) and support for the Board on all financial, logistical and communications issues.
 - The president works with the Board of Regents, fostering communication with and among all members of the board; respects the priorities and furthers the initiatives of the board; engages the board in the formulation and implementation of strategic and budget plans to advance the university's mission and goals; consults with the board in and considers alternative views of board members in the development of major policies; and keeps the board apprised of significant issues and conditions that have implications for the university.
 - The president also works with a wide range of internal and external constituencies in providing leadership for the university; develops productive relationships with people of diverse interests and affiliations; increases institutional resources and support, including state and federal funding and private gifts; and protects and furthers the excellence of each individual campus, while promoting the university's image and reputation as a premier public research institution statewide, nationally, and internationally. The president fosters and builds upon the strengths of the university and provides leadership to guide its future course; respects the role of faculty, staff and students in university governance as described in the *Laws of the Regents*; provides leadership in developing academic priorities and programs; works with the faculty to enhance the quality, and delivery of teaching, scholarship, and service; supports and encourages diversity throughout the university community; and leads the university community in establishing a clear, singular vision for the university.
 - The president is responsible for fiscal management and compliance with applicable policies, laws, rules, regulations, and contracts, grants, and donor restrictions; recruits, builds, and retains a professional executive team to achieve prudent and effective management of the university's intellectual, human, and financial resources; and in collaboration with the executive team, establishes a control environment focused on achieving the university's vision while promoting strong business acumen, integrity, and accountability.

Experience: A successful candidate for the presidency of the University of Colorado must have an extensive record of leadership accomplishments and prudent management at a senior level in education, business, public, and/or government service. The person must demonstrate the capacity to lead an organization as complex and diverse as the University of Colorado. The attainment of a terminal academic degree strengthens the individual's candidacy, as does a record of excellence in teaching, research, and service activities at a university. A successful candidate must have an appreciation for instructional and information technologies, an understanding of national and international trends, issues, and demographics affecting the university, and a demonstrated capability in institutional advancement, including fundraising and legislative relations.