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## ACCEPTANCE

This dissertation, A HISTORICAL ANALYSIS OF THE LEADERSHIP AND STRATEGIC PLAN OF CHANCELLOR STEPHEN R. PORTCH IN THE UNIVERSITY SYSTEM OF GEORGIA, by JENNIFER ELÍS FAIRCHILD-PIERCE, was prepared under the direction of the candidate's Dissertation Advisory Committee. It is accepted by the committee members in partial fulfillment of the requirements for the degree Doctor of Philosophy in the College of Education, Georgia State University.

The Dissertation Advisory Committee and the student's Department Chair, as representatives of the faculty, certify that this dissertation has met all standards of excellence and scholarship as determined by the faculty. The Dean of the College of Education concurs.

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## ABSTRACT

### A HISTORICAL ANALYSIS OF THE LEADERSHIP AND STRATEGIC PLAN OF CHANCELLOR STEPHEN R. PORTCH IN THE UNIVERSITY SYSTEM OF GEORGIA

by

Jennifer Elís Fairchild-Pierce

This dissertation provides historical insight into the design and implementation of one strategic plan of a public higher education system in an effort to inform future similar strategic planning processes. On July 1, 1994, the Board of Regents appointed Stephen R. Portch the ninth Chancellor of the University System of Georgia. The timing was advantageous because then Governor Zell Miller was determined to leave his legacy as Georgia's "education governor," and in those prosperous economic times, the Governor was eager to pour money into the university system. The regents selected Portch because they recognized his potential to lead the system through a period of unprecedented transformation. They were looking for a leader with vision, and they saw that in Portch. The goal of the Portch chancellorship was to move the University System of Georgia into the national forefront, and he achieved this objective via strategic planning.

The strategic planning process occurred in three phases. The first phase was the development of a vision statement; the second stage was the ratification of 34 guiding principles; and the final stage was implementation of the plan. This dissertation provides an analysis of the strategic planning process and its resulting policy directives. Using historical research methods, I carefully examine the primary goals the strategic plan set forth, and whether and how it met those goals.

Further, I examine Portch's leadership style, identifying both strengths and weaknesses, as well as how his leadership influenced the success of the plan. Using oral history methods, I interviewed the Chancellor Emeritus as well as members of the Board of Regents and the University System Office staff who played key roles in the development and implementation of the strategic plan. I also interviewed faculty members, students, and legislators to solicit their perspectives on the Chancellor, the plan, and their legacy.

In the mid-1990s, the university system benefited greatly from the synergy of having a unified board, a supportive governor and legislature, and a booming economy. These conditions enabled Portch, a chancellor with a vision and strong leadership skills, to move the system forward significantly in a relatively short time.



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OF CHANCELLOR STEPHEN R. PORTCH IN THE  
UNIVERSITY SYSTEM OF GEORGIA

by  
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A Dissertation

Presented in Partial Fulfillment of Requirements for the  
Degree of  
Doctor of Philosophy  
in  
Educational Policy Studies  
in  
the Department of Educational Policy Studies  
in  
the College of Education  
Georgia State University

Atlanta, GA  
2008

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2008

## ACKNOWLEDGEMENTS

This dissertation would not have been possible without the considerable effort of Dr. Philo Hutcheson. Philo taught the first course I took in this program, History of Higher Education, and it is only fitting that he should chair my dissertation committee. We have been through both academic and personal trials together, and I would not have persevered through this program of study had it not been for Philo's commitment to the program and willingness to stand by me every step of the way.

I also owe a tremendous debt of gratitude to Shelley Clark Nickel, my supervisor, my mentor, and my friend. Shelley encouraged and supported me both professionally and personally through the arduous process of crafting this dissertation. She also assisted me significantly in understanding the budgetary implications of semester conversion.

Many other professional colleagues also assisted me in this endeavor. Chancellor Emeritus Stephen Portch was available to me not only for interviews, but also for phone calls and emails. He was always responsive and candid, and I greatly appreciate his willingness to let me write this account of his chancellorship. Gail Weber ensured when she retired from the Board of Regents that I would have access to all of the Chancellor's Office files I would need to research the development of the 1994 strategic plan and Portch's term as Chancellor. John Millsaps gave me full access to the Portch era files of the Office of Media and Publications, and he also provided maps of the University System of Georgia, which I used as templates for the maps in the appendix. Arlethia Perry-Johnson shared her personal collection of news clippings. Cathie Mayes Hudson lent me her mission review files. Regent Elridge McMillan provided documents from his personal files, and Jim Muyskens contributed pictures from his personal collection. Tom Daniel also provided full access to his archival files of the Portch administration. I could not have written this dissertation without the contributions and encouragement of my colleagues in the University System Office.

Although they had never met me before, Sidney Bremer and Sharon James welcomed me into their homes in Wisconsin and granted lengthy, insightful interviews. Sid Bremer also shared her personal files, her only copies of original strategic planning documents, and even excerpts from her personal diary from the period when she worked in the University System of Georgia. I cannot thank Sid and Sharon enough for their essential participation in this project.

There were a number of close personal friends who assisted me in the revision process. Mary Lee, Cathy Alexander Poley, and Tracy Walden volunteered to proofread various drafts, helping make this dissertation both scholarly and accessible. Karen Rader transcribed numerous interviews and proofread the first drafts of several chapters. Monica Williams lent her impeccable graphic arts abilities in revising the maps provided by John Millsaps to make them specific to my dissertation needs. Meanwhile, Jennifer Straeffer waited patiently for me to finish each stage in the writing process to steal away to visit her and her new family in North Carolina. Those visits provided the spiritual and intellectual renewal I needed to keep going.

I might never have completed this dissertation without the encouragement and unconditional love of my husband, Andrew. I have been a doctoral student almost as long as I have been a wife. I am ever so grateful for Andy's infinite patience and understanding, especially during this last phase of writing the dissertation. I also want to thank my parents, Linda Bradford Laird and George Wesley Fairchild, who have always believed in my abilities and encouraged me to follow my dreams. My grandparents, Helen and Harold Bradford, were always there when I needed them. Mary Sue Fairchild, my beloved stepmother, was also a constant champion. Even on her death bed, she encouraged me to persevere in my studies and career goals, but I look forward to making family the number one priority in my life, as it should be.

Finally, this dissertation is dedicated in loving memory to my grandmother, Bernice Reddy Fairchild. Granny supported me emotionally and financially through all stages of my life and my academic pursuits. If it had not been for the sacrifices she made for me and my family, I might not have fulfilled my lifelong dream of earning a doctorate.

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## CHAPTER ONE: INTRODUCTION

The Board of Regents of the University System of Georgia appointed Stephen R. Portch its ninth Chancellor on July 1, 1994. The timing was advantageous because then Governor Zell Miller was determined to leave his legacy as Georgia's "education governor," and in those prosperous economic times, the governor was eager to pour money into the University System. The regents selected Portch because they recognized his potential to lead the System through a period of unprecedented transformation. They were looking for a leader with vision, and they saw that in Portch. The goal of the Portch chancellorship was to move the University System of Georgia quickly into the national forefront, which he attempted to do before he departed the system in 2001. This dissertation is a critical historical analysis of the 1994 strategic plan of the University System of Georgia with a focus on the role of Chancellor Portch in its development and implementation. It carefully examines the measurable goals the strategic plan set forth, and it identifies the shortcomings of the plan and its creator. While it includes a brief biographical sketch of Portch up to and including his years as Chancellor, the primary aim of the dissertation is a critical analysis of the strategic planning process during Portch's chancellorship and, where relevant, up to today. I dissect the vision and the strategic plan to determine its strengths and weaknesses, its successes and shortcomings. I also analyze Chancellor Portch's leadership style and how his leadership influenced the

outcomes of the strategic plan. This work provides historical insight into the design and implementation of one strategic plan in an effort to set an example for strategic planning processes to follow. Moreover, it represents a significant contribution to the literature regarding strategic planning at the system level and to the history of the University System of Georgia.

### Literature Review

The official history of the University System of Georgia was written by Cameron Fincher, Regents Professor of Higher Education and Psychology and former Director of the Institute of Higher Education at the University of Georgia in Athens. *Historical Development of the University System of Georgia: 1932-2002* was updated in a second edition published by the Institute of Higher Education in 2003, but like most institutional histories, it is not a rigorous scholarly work, but rather a collection of dates, facts, and figures that provides a rather superficial history of the system.<sup>1</sup> The book's discussion of the Portch years is only approximately 15 pages; however, it provides a sufficient starting point for this dissertation. Fincher writes:

In the mid-1990s the University System of Georgia was in the fortunate position to benefit from the synergistic effect of a progressive governor, a cooperative Board of Regents, strong allies in the General Assembly, and the dedicated leadership of out-going and in-coming chancellors. Also contributing to the University System's good fortune was a favorable state economy, a climate of optimism concerning Georgia's future as state and society, a technological revolution in communications, and the international visibility of Atlanta, Georgia as the site of the 1996 Olympics.<sup>2</sup>

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<sup>1</sup> Lester F. Goodchild and Irene Pancner Huk, "The American College History: A Survey of Its Historiographic Schools and Analytic Approaches from the Mid-Nineteenth Century to the Present," in *Higher Education: Handbook of Theory and Research*, ed. John C. Smart, vol. 6 (New York: Agathon Press, 1990), 201-290.

<sup>2</sup> Cameron Fincher, *Historical Development of the University System of Georgia: 1932-2002*, Second Edition (Athens: Institute of Higher Education, The University of Georgia, 2003), 113.

Moreover, Fincher cites the years of the Portch administration as the period in which the University System of Georgia became the nation's fourth largest public higher education system.<sup>3</sup> These characteristics played a very important role in the success of the 1994 strategic plan.

Although there is a relative dearth of literature specifically pertaining to the strategic planning process at the state system level, there are a few texts on state systems of higher education and governing boards. In his book, *Restructuring Higher Education: What Works and What Doesn't in Reorganizing Governing Systems*, Terrence J. MacTaggart argues that regardless of the extent to which a state board participates in higher education governance, the role of the board members and staff is to strike a balance between the needs of the institutions and the needs of the state's citizenry. Despite institutional discomfort with centralization, many believe it lends itself to increased productivity and efficiency.<sup>4</sup>

The disadvantages of a centralized higher education system include the diminishment of presidential power, the increase of governing board power, and the ambiguous delineation of control. The task, therefore, is to develop fresh kinds of governmental and educational leadership that will thwart the possible negative results of big bureaucracies. MacTaggart asserts that in order to improve their existing systems of higher education, states must first improve the process by which board members are chosen. In many states, board members are appointed by governors in return for political favors or campaign contributions, while other, more qualified candidates go unnoticed.

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<sup>3</sup> Ibid, 134.

<sup>4</sup> Terrence J. MacTaggart, *Restructuring Higher Education: What Works and What Doesn't in Reorganizing Governing Systems* (San Francisco: Jossey-Bass Publishers, 1996), 18, 35.



MacTaggart suggests that the selection process could be improved by appointing a nonpartisan committee to screen potential candidates and by creating publicly stated impartial and arduous measures on which to select the candidates. He also recommends reconsideration of term limits for board members. It can be argued that board members become more seasoned over time and with experience and that internal lobbying for board control wastes time and energy that could be better spent elsewhere. Once board members are selected, they could be better educated about their new roles and the history and structure of their system. For instance, they could have an annual orientation for all board members and could undergo a yearly internal self-assessment exercise to determine both their successes and areas for improvement. MacTaggart also suggests that an external analysis could be helpful for use in strategic planning for the system. Board members should be in frequent communication with legislators if they are truly to serve as the liaison between the state and the system. Likewise, they should be in constant communication with the system institutions. Moreover, constituent participation is critical to the function of an effective board.<sup>5</sup>

MacTaggart contends that boards should have more power to do their job without interference from the legislature and the public. Many states have open-meeting laws that make it difficult for boards to do business because they are not allowed to make decisions behind closed doors. He argues that discussions about transfers and purchases of property, personnel matters, lawsuits, and the like would be better handled in executive session. Additionally, constitutional authority or another form of legal protection is necessary to enable boards to provide unwavering long-term policy direction no matter

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<sup>5</sup> Ibid., 22-23, 228, 43, 46, 44, 45, 240.

the politics of the legislature at any given time.<sup>6</sup> In Georgia, a constitutional amendment was passed on August 3, 1943, granting constitutional authority to the Board of Regents of the University System of Georgia.<sup>7</sup>

In their book, *The Effective Board of Trustees*, Richard P. Chait, Thomas P. Holland, and Barbara E. Taylor summarize the traits and behaviors that characterize strong governing boards. They name six sets of “competencies” for board effectiveness, dedicating a chapter to describing each. The first competency is the “contextual dimension.” That is, effective boards understand the uniqueness of the organization, its mission, history, and culture, and their decisions reflect the organization’s values. The second competency is the “educational dimension.” “As self-directed learners, strong boards: (1) consciously create opportunities for trustee education; (2) regularly seek feedback on the board’s performance; and (3) pause periodically for self-reflection, especially to examine the board’s mistakes.”<sup>8</sup> The third competency is the “interpersonal dimension.” This entails the development of the board as a group in order to foster a sense of inclusiveness among board members, to set group goals, and to prepare them for leadership positions on the board. The fourth competency is the “analytical dimension.” “Effective boards approach problems from a broad institutional outlook, search widely for information, and actively seek different points of view. Aware of the subtleties and nuances of multifaceted issues, effective boards tolerate ambiguity and recognize that complex matters rarely yield to perfect solutions.” The fifth competency is the “political dimension.” This entails respecting the governance process and accepting as a primary

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<sup>6</sup> Ibid., 46, 215.

<sup>7</sup> Fincher, 24.

<sup>8</sup> Richard P. Chait, Thomas P. Holland, and Barbara E. Taylor, *The Effective Board of Trustees* (Phoenix: Oryx Press, 1993), 9, 17, 26.

responsibility the fostering of healthy relationships among key constituents. The sixth and final competency is the “strategic dimension,” which is the board’s ability to conceive and foster the strategic direction of the organization. The authors stress that effective boards foresee issues and act before those issues become serious.<sup>9</sup> In my dissertation, I argue that the Board of Regents’ 1994 strategic plan was not merely reactive, but also proactive.

*Designing State Higher Education Systems for a New Century* by Richard C.

Richardson, Kathy Reeves Bracco, Patrick M. Callan, and Joni E. Finney is a comparative study of seven state structures for higher education governance published by the National Center for Public Policy and Higher Education. The states studied and discussed in the book are California, Florida, Georgia, Illinois, Michigan, New York, and Texas. The majority of the book is dedicated to providing a state per chapter historical analysis of the evolution of each state’s higher education system as well as a thorough discussion of the status of those systems at the time the book was written. In each chapter’s discussion of a particular state, the authors address the same issues: a general discussion about the particular state, a history of higher education in that state, the relationship between the state and its system(s) and/or institutions of higher education, and the distribution of responsibility for the four work processes between the state and the system(s) and/or institutions. The authors are thorough in their description and analysis of the histories and developments of each state system, and they do not neglect consideration of the private sector in their work.

The authors of this study report that Georgia’s unified higher education system managed by a single governing board with constitutional authority constitutes the most

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<sup>9</sup> Ibid., 42, 51, 59, 77, 81, 95, 100.

simply designed system of the seven states studied.<sup>10</sup> They state that the governor's power over state higher education lies in the appointment of board members and oversight of the state budget. Likewise, the legislature's only direct authority over the system is in determining its share of the state budget. The authors report:

While the Senate Higher Education Committee and the House Committee on the University System of Georgia technically have responsibility for policy issues, the appropriations committees in both houses in fact have the most direct impact on higher education. The chair of the higher education committee in each chamber, however, typically chairs the Appropriations Subcommittee for [the University System of Georgia], which provides these members with more influence than in other states, where higher education committees typically are not connected to the appropriations process.<sup>11</sup>

The study was published during Portch's chancellorship and depicts him as highly respected by elected officials due to his strategic communications with key legislators, including the voluntary implementation of an annual accountability report. During Portch's chancellorship, budget requests were linked very clearly to the Board's strategic planning initiatives and key legislators considered the System to be responsive to state needs. The legislature and governor rewarded the System with significant budget increases and 6% salary increases for four consecutive years.<sup>12</sup> The authors state, "Strategic planning has been the cornerstone of [Portch's] attempt to take advantage of the 'window of opportunity' represented by a strong economy, a supportive governor and general assembly, and institutions 'refreshingly ready for change.'"<sup>13</sup>

*Moving a Battleship with Your Bare Hands: Governing a University System* is a board member's account of leadership of and planning for a public system of higher

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<sup>10</sup> Richard C. Richardson, Jr., Kathy Reeves Bracco, Patrick M. Callan, and Joni E. Finney, *Designing State Higher Education Systems for a New Century* (Phoenix: Oryx Press, 1999), 106.

<sup>11</sup> *Ibid.*, 109.

<sup>12</sup> *Ibid.*, 118. Note that this was a period of an exceptionally strong state budget.

<sup>13</sup> *Ibid.*, 119.

education. In the book, Laurence Weinstein reflects on his term as a regent and president of the University of Wisconsin System Board of Regents, a period which overlaps with Portch's employment in the University of Wisconsin System. Of Portch in particular, Weinstein says relatively little. He notes, "There was an obvious turnabout in the System administration with the addition to the staff of Vice President for Academic Affairs Stephen Portch and President Lyall."<sup>14</sup> He also states that Portch had asserted to him that undergraduate instruction and graduate research were not incompatible.<sup>15</sup> Finally, he notes that Portch supported enrollment management in the University of Wisconsin System, which in 1992 admitted the lowest number of freshmen since 1971.<sup>16</sup> He quotes Portch as saying, "What we are saying is that we will not take more freshmen than we can handle. We're trying to keep enrollment in line with resources. This is positive."<sup>17</sup> However, Weinstein is critical of the fact that the enrollment management efforts did not at the same time address retention issues.<sup>18</sup>

Weinstein's book has more in common with Georgia than just Portch. The University of Wisconsin System, like the University System of Georgia, is a large and complex system with similar challenges and a comparable governance structure. Like the University System of Georgia, the University of Wisconsin System has an array of degree-granting institutions, including research, four-year, and two-year institutions.<sup>19</sup> They have a common mission of education, research, and service. Both systems are entirely separate from their states' vocational adult education systems. Both have

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<sup>14</sup> Laurence A. Weinstein, *Moving a Battleship with Your Bare Hands: Governing a University System*. (Madison: Magna Publications, Inc. 1993), 176.

<sup>15</sup> *Ibid.*, 178.

<sup>16</sup> *Ibid.*, 207.

<sup>17</sup> *Ibid.*, 207.

<sup>18</sup> *Ibid.*, 207.

<sup>19</sup> At the time of publication of Weinstein's book, the University of Wisconsin System had 27 institutions, and the University System of Georgia had 34 institutions.

constitutional authority and are governed by a board of regents that has authority over systemwide policies and budgets. The manner in which regents are appointed in both systems is very similar. In Georgia, regents are appointed by the governor and confirmed by the senate, while in Wisconsin, regents are nominated by the governor and officially appointed by the senate. In both states, the senate rarely challenges, much less rejects, the governor's candidate. Moreover, both systems have similar strategic problems, including, but not limited to, balancing quality and access, obtaining funds other than state appropriations and tuition, and maintaining the quality of undergraduate education while simultaneously encouraging research.

Weinstein describes the struggle to effect change in such a complex system as being like “moving a battleship with your bare hands.”<sup>20</sup> The book explores how to create change, focusing primarily on the attitudes of regents toward their governance role. Weinstein urges regents to “step back from their preconceived ideas about the role of public higher education in our society and leave their political loyalties outside the board room.”<sup>21</sup> He strongly encourages them to embrace the responsibilities assigned to them by virtue of the Wisconsin Statutes in order to “move the battleship.”<sup>22</sup>

Although this dissertation is not a biography, it does examine Portch's leadership style, and thus, I also reviewed select biographies of higher educational leaders. In *Between Harvard and America: The Educational Leadership of Charles W. Eliot*, Hugh Hawkins meticulously and thoroughly explicates Eliot's forty-year presidency of Harvard University in the context of American cultural and political history. In 1869, at 35 years

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<sup>20</sup>Weinstein, 4.

<sup>21</sup> Ibid., 239.

<sup>22</sup> Ibid., 251.

old, Eliot was elected the youngest president in the history of Harvard.<sup>23</sup> Hawkins casts Eliot as a “mediator” between the tensions of academic and social values, the intellectual and utilitarian roles of higher education. Eliot’s inaugural address foreshadowed change and innovation, and during his presidency, Harvard transformed from a college into a modern American university, leading the way for the transformation of other institutions of higher education in its wake. Eliot raised professional school standards, increased the size of the faculty, established faculty pensions and sabbaticals, transformed the administration and organization, and championed academic freedom. He also effected change in secondary education by influencing secondary schools to change their curricula to meet the standards at Harvard. However, Eliot was more than just an educational reformer; he was a social and moral force in the fabric of American society. He continued to have influence as an Overseer at Harvard following his retirement, and he continued to be an active influence in American culture until, and beyond, his death in 1926.<sup>24</sup>

In *Robert M. Hutchins: Portrait of an Educator*, Mary Ann Dzuback depicts the life of Hutchins with primary focus on his 22-year presidency at the University of Chicago.<sup>25</sup> In 1929 at the tender age of 30, Hutchins was appointed as President by the trustees who saw in him a charismatic and gifted individual, an energetic and effective orator, and a potentially strong leader. The trustees had already drafted a plan for interdisciplinary curricular redesign for the first two years of his administration, but they did not anticipate that Hutchins would attempt to radically transform the mission and curriculum of the institution. Deeply rooted in his religious upbringing and Oberlin

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<sup>23</sup> Hugh Hawkins, *Between Harvard and America: The Educational Leadership of Charles W. Eliot* (New York: Oxford University Press, 1972), 47.

<sup>24</sup> *Ibid.*, vii, 48, 55, 63, 67, 74, 59, 261, 290, 299.

<sup>25</sup> Mary Ann Dzuback, *Robert M. Hutchins: Portrait of an Educator* (Chicago: The University of Chicago Press), 1991.

College education, Hutchins held a conviction that all knowledge was ultimately related. Influenced greatly by Mortimer Adler, Hutchins became enamored with the great books project and tried to impose the philosophy on the undergraduate curriculum. However, in attempting to reorganize the structure and curriculum of the university, Hutchins' tenure was marred by disagreements with the faculty over the mission of the university, educational policy, as well as appointments, making him ineffectual at creating consensus among the faculty. While Dzuback lauds Hutchins' clarity of vision and his charismatic and energetic leadership in creating an ongoing lively debate about the purposes of education both within and without the institution, she concedes that his stubborn resolve put him at odds with the modern university, and ultimately, his inflexibility and the social conditions of the Great Depression and World War II hindered him from having the long-term effect on the institution he attempted to transform.<sup>26</sup>

*The Academic President as Moral Leader: James T. Laney at Emory University, 1977-1993* by F. Stuart Gulley is a favorable but fair account of Laney's presidency.<sup>27</sup> Despite the facts that Gulley characterizes Laney as a long-time family friend, that he attended the university during Laney's presidency, and that he later served as an administrator at Emory under Laney, Gulley makes a concerted effort to avoid the trappings of a hagiography. Instead, he approaches the Laney biography with considerable academic and historical methodological rigor and is clearly striving for objectivity and balance. Still, Laney emerges as a leader with incredible vision, talent, and integrity.

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<sup>26</sup> Ibid., 81, 20, 159, 69.

<sup>27</sup> F. Stuart Gulley, *The Academic President as Moral Leader: James T. Laney at Emory University, 1977-1993* (Macon: Mercer University Press, 2001).



Gulley organizes his analysis into six chapters in order to compartmentalize the various facets of the Laney presidency. Chapter 1 addresses Laney's life before and rise to the presidency of Emory in 1977. This chapter provides early biographical information and the events in Laney's life that led up to the presidency. The focus of Chapter 2 is Laney's vision for Emory, particularly his interest in the moral and societal purposes of higher education. Gulley sufficiently critiques and contextualizes Laney's vision, which is clearly idealistic. Moreover, Gulley places this ideal in the is-ought dichotomy of Laney's presidency throughout the book, giving particular attention to the struggles to maintain this ideal for students while at the same time advancing the university nationally. Chapter 3 focuses exclusively on Woodruff's \$105 million gift to Emory in 1979. In this chapter, Gulley analyzes the Woodruff family relationship to Emory and Atlanta as well as Laney's relationship with Robert Woodruff. Gulley offers a thorough analysis of the Woodruff's motivations in giving the gift, which was at the time the largest gift in higher education history. He also discusses in great detail how Laney managed the institution's newfound wealth, demonstrating his great fiscal prudence and inclusive leadership style. In Chapter 4, Gulley gives a holistic analysis of the transformation of Emory under Laney's leadership. He systematically divides Laney's presidency into three distinct stages. During the first stage, 1977 to 1980, Laney established his vision for the university, assessing its needs and securing funding. Gulley characterizes the second stage of Laney's presidency, 1981 to 1986, as the "era of the college and the student."<sup>28</sup> During this period, Laney focused his efforts to strengthen the liberal arts program. During the third stage of Laney's presidency, 1987 to 1993, Emory rose to national prominence both in the quality of its students and its faculty. In his fifth

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<sup>28</sup> Ibid., 7.

chapter, Gulley focuses on the challenges Laney faced during his presidency. In the final analysis, Gulley holds Laney up as a man who stands by his principles and convictions even in times of trouble.

Although followed by a brief conclusion, the book's true culmination is the sixth chapter, in which Gulley discusses those attributes that make Laney an effective leader. He defines an academic leader as such: "A leader in higher education... is one whose vision gains the confidence and support of followers in all constituent groups."<sup>29</sup> This is a characteristic of Laney that Gulley successfully drives home in every chapter of his book and one which he supports by a number of archived letters and interviews. Gulley does a masterful job of capturing the presidency of James Laney at Emory.

### Historical Research Method

In nineteenth century Germany, historicism developed as the main mode of historical research. However, simultaneously in Germany, Karl Marx and Frederick Engels developed an entirely different theory of history that would greatly influence twentieth century thought. Researchers today use both of these modes of historical understanding, but the modes have two very different aims and methodologies.

Historicism maintains that every age has its own customs and ideals and that understanding any period in history requires an effort to understand it from its own context and perspective rather than through the lens of the current day. Historicism is less concerned with whether history repeats itself or what we can learn from history in order to shape the present and future. Rather, the father of historicism, Leopold von Ranke,

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<sup>29</sup> Ibid., 201.

wrote that history's aim is merely to show "how things actually were."<sup>30</sup> However, the American adaptation of German historical methods was more focused on empiricism than on the idealism that German scholars embraced.<sup>31</sup> The function of historical research, then, is not to influence the future, but simply to reflect on and create a better understanding of the past: "Modern historical consciousness comprises two elements: an awareness of the disparity in circumstances and mentality which creates a gulf between all previous ages and our own, and a recognition that our world owes its distinctive character to the way in which it has grown out of those past circumstances and mentalities."<sup>32</sup> Moreover, historicists emphasized the affairs of the state based on the Hegelian premise that the state was the primary agent of historical development. For historicists, then, studying history means studying the history of the state and its leadership or, in other words, examining archives and other official primary sources.

Marxists see history in quite a different light. In *The Communist Manifesto*, Marx and Engels wrote, "The history of all hitherto existing society is the history of class struggles."<sup>33</sup> Rather than focusing on political history, they focused on economic and social history and asserted that historical developments are essentially manifestations of property relations. Accordingly, historical emphasis was shifted away from the state to the economic oppressors and the masses of workers, the oppressed. The purpose of historical study for Marx was to educate the current-day proletariat on when and how to have a successful revolution against the bourgeoisie. Marx objected to the historicist

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<sup>30</sup> John Tosh, *The Pursuit of History: Aims, Methods and New Directions in the Study of Modern History* (Harlow: Longman Group Ltd., 1984), 11.

<sup>31</sup> Lawrence R. Veysey, *The Emergence of the American University* (Chicago: The University of Chicago Press, 1965), 127.

<sup>32</sup> Tosh, 12.

<sup>33</sup> Karl Marx and Frederick Engels, *Manifesto of the Communist Party*, 1848; available from <http://www.marxists.org/archive/marx/works/1848/communist-manifesto/>; Internet; accessed March 11, 2007.

research method on the basis that it lends itself to hegemony. “Their error, he maintained, lay in taking at face value what the historical actors said about their motives and aspirations; in so doing, Ranke and his imitators imprisoned themselves within the dominant ideology of the age in question which was merely a cloak for the real material interests of the dominant class.”<sup>34</sup>

Both Ranke and Marx were reacting to the political and social climate of Europe in the mid-nineteenth century, particularly the French Revolution and industrialism; however, they responded in very different ways. Ranke responded conservatively. He promoted historicism, a methodology that studies history for its own sake and applies analytical methods for examining sources in their own context to understand how things really were. The approach was very methodical and reflective. For Marx, history is not about reflection, but rather it is a call to action. He saw the present as the opportunity for a revolution to end all revolutions, a revolution that would destroy the very concept of class altogether. Although Ranke’s contemporaries embraced his concept of history, Marxism gradually gathered momentum and only achieved its greatest recognition in the twentieth century.<sup>35</sup> While historians today still widely employ Ranke’s research methods emphasizing primary sources and archives, Marxist theory broadened our understanding of how history changes and introduced the notion that there were other relevant actors outside of the state, which is perhaps his greatest contribution to historical research.

In the tradition of historicism, this project is grounded primarily in archival research, particularly as it pertains to the archives of the Board of Regents themselves, including meeting minutes, official letters and communications, publications, data, and

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<sup>34</sup> Tosh, 141.

<sup>35</sup> Ibid., 78.

archival files, all of which were made available to me at the University System Office located in Atlanta, Georgia. In addition to archival research, the dissertation includes a thorough review of all relevant publications, such as newspaper and magazine articles, as well as articles in scholarly publications and higher education journals such as *The Chronicle of Higher Education*. Much like the Fincher book, these sources provide simply a foundation of dates, facts, and figures to be further researched and critically examined.

However, to supplement archival research, this dissertation includes a significant oral history component with interviews conducted in accordance with the standards of the Oral History Association. “Oral history is a method of gathering and preserving historical information through recorded interviews with participants in past events and ways of life. It is both the oldest type of historical inquiry, predating the written word, and one of the most modern, initiated with tape recorders in the 1940s.”<sup>36</sup> However, unlike in early medieval times when people would relate stories over and over again around the dinner table, the purpose of modern oral history is to preserve a verbatim record of the spoken word.<sup>37</sup> Oral history recordings are primary source material created specifically for the purposes of history and archives. “Oral history projects tend to come about where significant developments occur and where there is a paucity of archival or written records about them.”<sup>38</sup>

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<sup>36</sup> Oral History Association Home Page; available from [www.dickinson.edu/oha](http://www.dickinson.edu/oha); Internet; accessed December 7, 2003.

<sup>37</sup> Louis Starr, “Oral History,” in *Oral History: An Interdisciplinary Anthology*, ed. David K. Dunaway and Willa K. Baum (Nashville: American Association for State and Local History, 1984), 4.

<sup>38</sup> Alice Hoffman, “Reliability and Validity,” in *Oral History: An Interdisciplinary Anthology*, ed. David K. Dunaway and Willa K. Baum (Nashville: American Association for State and Local History, 1984), 69.

Most important to any research, but perhaps most comprehensively applied to oral history, is integrity. I completed the Institutional Review Board process to ensure compliance with federal law and Georgia State University policy pertaining to research involving human subjects. Beyond necessary legal matters, however, throughout the process of conducting oral history interviews, the interviewer must be conscious of the many facets of the oral history process in order to obtain the most spontaneous and authentic interview possible. The Oral History Association has published principles and standards as well as project/interview guidelines to help in this process. It is important to note that in addition to the interviews, it is advisable to collect as much documentation as the interviewees might share, such as photographs, school publications, etc. It is also important to record every detail related to the interview, such as time, date, setting, circumstances, and character of the interviewee.<sup>39</sup> This is important in creating a context and for interpreting the tone in which something was said, as it is hard to read sarcasm and other tonalities in typed print.<sup>40</sup>

Oral history is critical to this dissertation because of the number of individuals who shared a role in developing and implementing the 1994 strategic plan. This dissertation illuminates the process involved in the development and implementation of the plan, which has not been previously researched. A primary source of information is interviews of relevant subjects. In addition to numerous interviews with Chancellor Emeritus Portch, I interviewed Drs. Sidney Bremer and Sharon James, who each served consecutively as Special Assistant to the Chancellor. Dr. Bremer crafted the strategic plan

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<sup>39</sup> Allan Nevins, "Oral History: How and Why It Was Born," in *Oral History: An Interdisciplinary Anthology*, ed. David K. Dunaway and Willa K. Baum (Nashville: American Association for State and Local History, 1984), 33.

<sup>40</sup> Ibid.

document, and Dr. James developed the implementation plan. I also interviewed key regents, presidents, University System Office staff members, and faculty and student representatives. I was unsuccessful in securing a face-to-face interview with former Governor Zell Miller, who was a key player in this chapter of the history of the State of Georgia and the University System of Georgia. However, I was able to obtain written responses to my questions.<sup>41</sup> While I originally anticipated interviewing approximately 12 to 15 participants, my list grew to more than 40. From each interview, I learned of new people who had a hand in creating and implementing the strategic plan. In an effort to make this history as collaborative as the strategic plan itself, I interviewed the following participants:<sup>42</sup>

Baranco, Juanita P., Member, Board of Regents of the University System of Georgia, 1991-2001; Chair, Fiscal Year 1996  
 Barnes, Roy, Governor of the State of Georgia, 1998-2002; Georgia House of Representatives, 1993-1998  
 Bowes, William. R., Vice Chancellor for Fiscal Affairs, 2000-2007; Associate Vice Chancellor for Fiscal Affairs, 1995-2000  
 Bremer, Sidney H., Special Assistant to the Chancellor, 1994-1995  
 Burriss, Annie Hunt, Assistant Vice Chancellor for Development & Economic Services, 1995-2001  
 Clough, G. Wayne, President, Georgia Institute of Technology, 1994-2008  
 Coleman, Terry, Georgia House of Representatives, 1973-2006 (Chair, Appropriations Committee)  
 Daniel, Thomas E., Senior Vice Chancellor for External Affairs, 2000-present; previously Vice Chancellor for External Affairs; joined the Board of Regents in 1982 as Special Assistant to the Chancellor  
 Daniels, Linda M., Assistant Vice Chancellor for Design and Construction, 1998-2002; Director of Facilities Planning, 1995-1998; Project Architect, 1992-1995  
 Davis, Erroll B. Jr., Chancellor of the Board of Regents of the University System of Georgia, 2005-present; Member, University of Wisconsin System Board of Regents, 1987-1994  
 DePaolo, Rosemary, President, Georgia College & State University, 1997-2004  
 Desrochers, Lindsay, Senior Vice Chancellor for Capital Resources, 1995-2000

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<sup>41</sup> Note: Governor Miller's response was missing a page or two. I have made numerous attempts to obtain those pages to no avail.

<sup>42</sup> Participant titles reflect their roles as relevant to the Portch administration.

Dunning, Arthur N., Senior Vice Chancellor for Human and External Resources, 1994-2000

Evans, Dwight H., Member, Board of Regents of the University System of Georgia, 1993-1995

Fuchko, John, Student Advisory Council Chair, 1999-2000

Hanes, Madlyn, Senior Advisor to the Chancellor, 1999-2000

Henderson, Sue, Associate Professor of Mathematics and Provost of the Lawrenceville Campus, Georgia Perimeter College

Henry, Ronald, Provost, Georgia State University, 1994-present

Hudson, Cathie Mayes, Associate Vice Chancellor for Planning and Policy Analysis, 1995-2008; Assistant Vice Chancellor for Research, 1991-1995; Assistant Vice Chancellor for Planning, 1988-1991

James, Sharon, Special Assistant to the Chancellor, 1995-1996

Jones, Thomas Z. President, Armstrong Atlantic State University, 2000- present

Kettlewell, Janet, Assistant Vice Chancellor for Academic Affairs and Co-Facilitator of the Georgia P-16 Initiative, 1995-2008

Leebern, Donald M., Jr., Member, Board of Regents of the University System of Georgia, 1991-present; Chair, 1995-1996

Lord, Dorothy L., President, Coastal Georgia Community College, 1991-2008

McEver, Jimmie, Student Advisory Council Chair, 1994-1995

McMillan, Elridge W., Member, Board of Regents of the University System of Georgia, 1975-present (Chair, 1986-1987)

Miller, Zell, Governor of the State of Georgia, 1990-1998<sup>43</sup>

Millsaps, John, Director of Communications/Marketing, 1995-2006

Morgan, David, Deputy to the Senior Vice Chancellor for Academics and Fiscal Affairs, 1999-2001; Chief Operating Officer for Office of Academic Affairs, 1997-1999; Assistant Vice Chancellor for Academic Affairs, 1986-1997

Muyskens, James L., Senior Vice Chancellor for Academic Affairs, 1995-2000; Director of the Gwinnett University Center, 2000-2002

Nesbitt, Martha T., Interim President of DeKalb College, 1994-1995; Special Assistant to the Chancellor, 1996-1997; and President, Gainesville College, 1997-present

Nickel, Shelley C., Budget Director, University System of Georgia, 1997-2000; Special Assistant to the Chancellor, 2000-2003

Parker, Daniel F., Vice President and Managing Director of the Atlanta office of A.T. Kearney, Inc.

Perry-Johnson, Arlethia, Assistant Vice Chancellor for Media and Publications, 1995-2006

Phillips, Barry, Member, Board of Regents of the University System of Georgia, 1988-1994; Chair, 1993-1994

Portch, Stephen R., Chancellor of the Board of Regents of the University System of Georgia, 1994-2001

Sethna, Beheruz N., President, University of West Georgia, 1994-present

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<sup>43</sup> Governor Miller provided written responses to specific questions.



Skinner, Richard A., President, Clayton State University, 1994-1999; President and Chief Executive Officer of Georgia GLOBE (Global Learning Online for Business and Education, 1999-2002

Sutton, Richard C., Director of International Programs and Services, 1998-2007

Thursby, Randall A., Vice Chancellor for Information Technology and Chief Information Officer, 2000-2006; previously Associate Vice Chancellor for Information Technology

Wagner, Donald R., Dean of the Honors College, Director of Special Programs, and Professor of Political Science, University of West Georgia; American Association of University Professors Executive Secretary, Georgia Conference, 1982-1998

Walker, Larry, House Majority Leader, Georgia General Assembly, 1986-2002

Weber, Gail S., Secretary to the Board, 1995-2006

Wrigley, Steven W., Governor Zell Miller's Chief of Staff, 1993-1998

In writing this dissertation, I enjoyed a unique level of access to both records and individuals by virtue of my professional affiliation with the University System Office. I came to work in the Chancellor's Office in August 1997 having little knowledge of the Board of Regents beyond the Regents' Tests I had graded as a graduate student in the English Department at Georgia State University. I was hired as Assistant Secretary to the Board of Regents and the Chancellor with primary responsibility for writing the minutes of the board meetings and other myriad responsibilities with regard to the board meetings themselves. Over time, I was promoted to Associate Secretary and was given additional responsibilities for crafting meeting agendas and maintaining The Policy Manual of the Board of Regents of the University System of Georgia. I worked very closely with the Secretary to the Board, Gail S. Weber, who worked very closely with Chancellor Portch, and I had daily interactions with Portch himself. As such, I had a personal window into the workings of the Chancellor's Office and the Board of Regents. Having served under three chancellors, I had undeniable personal biases coming into the process of researching and writing this dissertation. However, as Hugh Hawkins wrote in the preface to *Between Harvard and America: The Educational Leadership of Charles W. Eliot*, "I

have sought to write critically, and not in celebration.’<sup>44</sup> Although it was Chancellor Portch who actually inspired me to pursue a doctorate in Educational Policy Studies, I have endeavored to write an objective and honest appraisal of his leadership and the strategic plan he crafted for the University System of Georgia. The primary aims of this dissertation are to discover how the 1994 strategic plan was developed and by whom, to assess what about the plan was successful and enduring, and to examine the leadership style of Chancellor Portch and how it influenced the success of the plan.

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<sup>44</sup> Hawkins, viii.

## CHAPTER TWO: A GOOD CHANCELLOR IS HARD TO FIND

Stephen Portch was born on September 11, 1950, in Somerset, England. His father was a doctor, and his mother was a nurse who stayed home with their two sons and two daughters and helped manage his father's home-based practice.<sup>1</sup> They read to their children and encouraged their academic interests.<sup>2</sup> Portch attended grammar school in Weston-super-Mare, a seaside resort town, and earned his bachelor's degree in English Literature and Language with honors from the University of Reading in 1973.<sup>3</sup> Portch first visited the United States during his undergraduate summer breaks, when he taught horseback riding at a boys' summer camp in New Hampshire. In the summer of 1973, he met his future wife, Barbara Barrows, who was a horseback riding instructor at the affiliated girls' summer camp.<sup>4</sup> "We met in a manure heap," Portch is quoted as saying. "We were shoveling manure... at a horse stable. It was one of those summer romances that forgot to end."<sup>5</sup>

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<sup>1</sup> Stephen R. Portch, email message to author, December 2, 2007.

<sup>2</sup> Stephen R. Portch, inaugural address, October 12, 1994 (hereafter cited as "Portch, inaugural address"). (This document is available in the files of the Secretary to the Board in a folder marked "Chancellor" in storage at the University System Office. A copy of this document is in the author's possession.)

<sup>3</sup> Stephen R. Portch, interview by author, Newnan, GA, June 7, 2007 (hereafter cited as "Portch, first interview"); Portch, curriculum vitae, 1994. (This document is available in the files of the Secretary to the Board in a folder marked "Chancellor" in storage at the University System Office. A copy of this document is in the author's possession.)

<sup>4</sup> Portch, first interview.

<sup>5</sup> Robert J. Vickers, "State's New Chancellor Sports an On-the-Fly, Hands-On Style," *The Atlanta Journal-Constitution* (March 27, 1994), A1.

Originally, Portch had planned to move to Vietnam after graduating college.<sup>6</sup> He was very interested in Vietnamese culture, and his undergraduate thesis was “Changes in Essence of War Poetry from Somme to Saigon.”<sup>7</sup> He had secured a job as a lecturer in English at the University of Hue and was prepared to go when the British government advised against it.<sup>8</sup> Portch instead took a teaching job at an exclusive boys’ boarding school in England, St. Lawrence College. It is fortunate that he did not go to Vietnam, considering Hue fell shortly thereafter. Instead, he attended graduate school in the United States. The head of his department at the University of Reading had been a visiting professor at The Pennsylvania State University (Penn State), and he helped Portch get an assistantship there.<sup>9</sup>

Prior to beginning his studies at Penn State, on Easter Sunday 1974, Portch immigrated to Shreveport, Louisiana, to join Barbara, who was finishing her last semester at Centenary College of Louisiana. At St. Lawrence College, Portch had taught English, history, and geography to prim and proper 13-year-old British boys who were studying subjects such as Latin, Greek, French, and calculus. As a permanent substitute teacher and baseball coach at Shreve High School in a period of forced integration, life was quite different. He had no more experience with such endemic racial tension than he had coaching baseball. On one occasion, the coaches were called to the school parking lot to break up a race riot. Although the incident turned out to be a false alarm, Portch quipped,

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<sup>6</sup> Portch, first interview.

<sup>7</sup> Ibid. and Portch, curriculum vitae, 1994.

<sup>8</sup> Portch, first interview.

<sup>9</sup> Ibid.

“Well chaps, that’s not really cricket, is it?”<sup>10</sup> It was a culture shock that perhaps foreshadowed his future in Georgia.

After Barbara graduated from college, they married and moved to Pennsylvania where Portch earned a Master of Arts in English with honors, penning a thesis titled “Impoverished Families at Dragons’ Mouths: Great Depressions in Flannery O’Connor’s Short Fiction.” He began his doctorate at Penn State, but he wanted to take a break and saw an opportunity to teach at a small two-year college in Wisconsin. Barbara was originally from a small town in Wisconsin, and they wanted to move there. So, Portch taught writing and literature courses as Assistant Professor of English at the University of Wisconsin Center-Richland. After four years of teaching, he took a year of leave to return to graduate school to complete his doctorate. In 1980, he returned to Richland, having not quite finished his dissertation. That year, Portch was recommended for the position of Campus Dean of the University of Wisconsin Center-Marathon in Wausau, another two-year college. He characterized the event as someone taking a great risk on him, something he has done for others in turn. At the age of 30 and without tenure or an earned doctorate, Portch became chief executive officer of a two-year institution of the UW System. He subsequently earned tenure and graduated with his doctorate from Penn State in 1982. As Campus Dean, Portch was responsible for 1,200 students, 75 employees, 3 buildings, and a \$3.3 million budget. He held this position for five years, a job he characterizes as “the best job I ever had of all of them, by far the best.”<sup>11</sup>

In 1986, Portch was appointed Chancellor of the University of Wisconsin Centers, the 13-campus two-year sector of the University of Wisconsin (UW) System. He and

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<sup>10</sup> Vickers, March 27, 1994, A5.

<sup>11</sup> Portch, first interview.

Barbara moved to Madison, where he worked for the first time at the system level.<sup>12</sup> In this role, he was responsible for 11,000 students, 750 employees, 80 buildings, and a \$37 million budget. He served in this capacity for five years, during which time, he was recruited heavily for presidencies around the country. In 1991, the Senior Vice President for Academic Affairs position became available and then-President Kenneth “Buzz” Shaw talked him into taking the job.<sup>13</sup> Portch considers Shaw to be a mentor and another person who gave him a great opportunity. Even though Portch preferred to work on a campus, Shaw sold him on the job by accentuating that he would be dealing with a medical school, research, and graduate as well as undergraduate education. Moreover, he would learn how to work with a board under someone he considered to be one of the very best at it. Over the course of his career, Portch had written and spoken extensively on issues of change, growth, and quality in the American university.<sup>14</sup> In this position, he would develop an enrollment management plan and a strategic plan for the UW System. He also led the system through some controversial issues, such as mandating faculty workloads.<sup>15</sup>

On February 9, 1994, John D. Phillips, head of the educational division of the executive search firm A.T. Kearney, Inc., called Portch at home about the open chancellorship in the University System of Georgia.<sup>16</sup> Portch had been recommended to

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<sup>12</sup> Ibid. and Portch, curriculum vitae, 1994.

<sup>13</sup> Note, the nomenclature of positions in the UW System is the inverse of those in the University System of Georgia. Whereas the chancellor is the head of the system in Georgia, the president is the head of the System in Wisconsin. In Georgia, the heads of institutions are called presidents, but they are called chancellors in the UW System.

<sup>14</sup> Undated bio from the period during which Portch was Chancellor of the University System of Georgia. (Hereafter, this document will be referenced as “Portch, 1994 bio.” This document is available in the files of the Secretary to the Board in a folder marked “Chancellor” in storage at the University System Office. A copy of this document is in the author’s possession.)

<sup>15</sup> Vickers, March 27, 1994, A4.

<sup>16</sup> Portch, first interview; Portch, inaugural address.

the firm by Buzz Shaw, who was now president of Syracuse University.<sup>17</sup> It was near the end of the search, and Phillips asked Portch to drive to Chicago in a blizzard to talk about the job. February 9 was a night of record cold in Wisconsin. The temperature in Madison was -28° with a wind chill of -87°.<sup>18</sup> According to the Portches, Barbara was bundled in three blankets in front of the fire, and when he told her of the job opportunity in Georgia, she said, “Talk to him!”<sup>19</sup> Portch was not looking for a job, but he drove to Chicago in the blizzard to learn more about the opportunity.<sup>20</sup>



Portch in Wisconsin

Meanwhile, in the University System of Georgia, Chancellor H. Dean Propst had announced his retirement in October 1993 after serving in that capacity for eight years.<sup>21</sup>

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<sup>17</sup> Portch email, December 7, 2007.

<sup>18</sup> James Salzer, “Regents Select Chancellor,” *The Augusta Chronicle* (March 23, 1994), 10C.

<sup>19</sup> Portch, inaugural address.

<sup>20</sup> Portch, first interview.

<sup>21</sup> Propst retired at the end of the calendar year, and Harry S. Downs, retired President of Clayton State College, served as Acting Chancellor from January 1 to July 1, 1994, the first day of Portch’s chancellorship.

During the Propst administration, in 1986, the state legislature approved full funding of a new budget formula developed under the leadership of two governors and two chancellors, including Chancellor Vernon Crawford (1979-1985).<sup>22</sup> Developed as a means to equitably appropriate state funds in the public higher education system, the “Formula for Excellence” was based upon credit hour enrollments. Also under the Propst administration, the “Special Funding Initiative” was established in 1988 to allot \$10 million for a new line item in the system’s budget request to address issues of access in the state.<sup>23</sup> Perhaps the greatest accomplishment of the Propst administration, however, was the completion and ultimate approval of a systemwide desegregation plan. After 15 years of plan submissions and negotiations, the U.S. District Court in Washington, D.C., and the U.S. Office of Civil Rights approved the System’s plan in 1988.<sup>24</sup>

Unfortunately, during the Propst administration, the University System of Georgia suffered financially due to poor economic conditions statewide. In 1992, circumstances were at their most dire when the system’s budget was cut by \$75 million.<sup>25</sup> Faculty salaries, which had ranked number one in the Southern Regional Education Board (SREB) states in the early 1980s, suffered a setback.<sup>26</sup> However, by 1993, the state’s economy was making a comeback and a new state lottery benefiting education had just been established. Governor Miller had pushed the Georgia Lottery for Education Act through the General Assembly in 1992. “The Georgia Lottery was the most successful start-up state lottery ever, with unprecedented ticket sales. The lottery began selling

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<sup>22</sup> Fincher, 91.

<sup>23</sup> University System of Georgia, “75 Years of Transforming Lives,” <http://www.usg.edu/pubs/bor75th/USG75years.pdf> (accessed on March 3, 2008).

<sup>24</sup> Ibid.

<sup>25</sup> Ibid.

<sup>26</sup> Ibid.



tickets on June 29, 1993. It met its first year sales goal of \$465 million within five months, and ended the year with total sales of over \$1.1 billion.”<sup>27</sup> Furthermore, Governor Miller ensured that the money generated by the Lottery was used only for educational purposes, specifically a voluntary prekindergarten program for four-year-old children and the newly established Helping Outstanding Pupils Educationally (HOPE) Scholarship Program. The HOPE Scholarship Program was Miller’s brainchild, and he considered it to be Georgia’s GI Bill.<sup>28</sup> Students who entered college with a B average and maintained a B average in college received free tuition, fees, and books at Georgia’s public colleges and universities. “I wanted it to be a scholarship program based on merit – not income level. I believe strongly that one can have anything if they are willing to work and pay the price for it. That includes a college education.”<sup>29</sup> In addition to the anticipated revenue generated by the Georgia Lottery, the State of Georgia was also looking forward to the opportunities the 1996 Olympics would afford, bringing a sense of enthusiasm and optimism to the state. Vice Chancellor for External Affairs Thomas E. (Tom) Daniel noted, “The psyche of the state at that time was very positive. People were anticipating the Olympics. There was certainly a spirit of euphoria. There was a kind of positive outlook.”<sup>30</sup>

By 1994, the University System of Georgia was the fourth largest university system in the nation with a \$2.5 billion budget, 203,000 students, and 28,500 faculty and staff members.<sup>31</sup> By all accounts, the University System of Georgia was in fair condition

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<sup>27</sup> Sarah Eby-Ebersole, ed., *Signed, Sealed, and Delivered: Highlights of the Miller Record*, compiled by Office of Planning and Budget (Macon: Mercer University Press, 1999), 48.

<sup>28</sup> Richard Hyatt, Zell: *The Governor Who Gave Georgia HOPE* (Macon: Mercer University Press, 1997), 306.

<sup>29</sup> Ibid.

<sup>30</sup> Thomas E. Daniel, interview by author, Atlanta, GA, May 24, 2007.

<sup>31</sup> Portch, 1994 bio.

at the end of Propst's chancellorship. "We were not broken. We didn't think we needed a major overhaul. We were doing okay. Things were going along quite nicely," said Regent Juanita Powell Baranco, who was appointed by Governor Miller in 1991 along with Regent Donald M. Leebern, Jr. Governor Miller recounted:

The University System prior to Steve Portch's arrival was strong, had good support, and by the late 80s had come a long way the previous 15 years. There was an interest in promoting joint research, in investing in facilities, and in serving students. I felt, however, that [it] lacked an overall direction and strategy – a way to build on its strengths in such a way to promote economic development and stimulate, not just encourage, but stimulate parents and students to pursue higher education.<sup>32</sup>

According to some interviewees, however, the previous chancellors had been simply "caretakers" of the System. Determined to create a legacy for himself as Georgia's "education Governor," Zell Miller wanted a chancellor who would bring the System to the national forefront. Portch's impression of the System was in line with Miller's. He said, "It was on very solid footing but not ambitious enough for itself in my view. I wanted us to be more ambitious in terms of what we could achieve."<sup>33</sup> Secretary Weber stated, "We were not on the cutting edge of anything, and his job was to make all of this happen."<sup>34</sup>

"[During] this period of time, Zell Miller was fixated on higher education," said Arthur N. Dunning, who worked in the University System Office during this period and later served as Senior Vice Chancellor for External and Human Resources during Portch's chancellorship. "I've always found it very interesting that if you ask Zell Miller what his profession was, he said college professor. If you think about it, that's very rare, not only in Georgia, but throughout the entire nation to actually find the Governor who

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<sup>32</sup> Zell Miller, letter to author, September 11, 2007.

<sup>33</sup> Portch, first interview.

<sup>34</sup> Gail S. Weber, interview by author, Decatur, GA, June 5, 2007.

considers his profession as a college professor,” said then Vice Chancellor for External Affairs, Thomas E. Daniel. Miller wanted dramatic change in the University System, and he wanted the regents to run the System, not the chancellor.<sup>35</sup> By 1993, he had powerful influence over the Board of Regents. He had appointed or reappointed a majority of regents, including his best friend, Edgar L. Jenkins, and he had made it known to his regents that he wanted a chancellor with vision to bring the University System of Georgia to national preeminence and that he was willing to put his money where his mouth was.<sup>36</sup> “The Board ended up being Zell Miller’s Board,” said Secretary Gail Weber. By most accounts, Governor Miller did not meddle in the chancellor selection process. “Governor Miller stayed out of the search process, and he allowed Barry Phillips, who was Chairman of the Board at the time, to really structure the search and allow the search firm to conduct a true national search for the chancellor,” said Daniel F. (Dan) Parker, Sr., who was Vice President and partner-in-charge of the search conducted by A.T. Kearney, Inc., a national executive search firm headquartered in Chicago.<sup>37</sup>

On October 27, 1993, the Executive Committee of the Board met for the first time to discuss the process of hiring a new chancellor.<sup>38</sup> The regents discussed whether to appoint an advisory committee of System constituents and whether to hire an executive search firm, which the Board of Regents had never done before.<sup>39</sup> The Executive Committee met again on November 5, 1993, to interview representatives from four

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<sup>35</sup> Ibid.

<sup>36</sup> Weber, interview.

<sup>37</sup> Daniel F. Parker, interview by author, telephone. June 20, 2007. See also Kathryn Hayes Tucker, “How They Found a Chancellor,” *Bill Shipp’s Georgia: A Weekly Newsletter on Government and Business*. Volume 7, No. 28. (March 14, 1994) 1.

<sup>38</sup> Minutes of the Meetings of the Board of Regents of the University System of Georgia, 1993-1994, 275 (hereafter cited as “Minutes, 1993-1994”).

<sup>39</sup> Tucker, March 14, 1994, 1.

executive search firms, with further interviews of two firms held November 9.<sup>40</sup> On November 10, 1993, the board selected the search firm A.T. Kearney, Inc.<sup>41</sup> According to *Bill Shipp's Georgia*:

For years, Parker has felt passionately, he says, that the regents should conduct professional searches for chancellors and college presidents, just as private business does. Eight times, he contacted Propst with proposals for searches, all without success. When Propst announced his retirement last year, Parker was doing business on the West Coast. He faxed letters to the governor and the chairman of the regents asking to present a proposal for a search.<sup>42</sup>

Not only did Parker get the job, but A.T. Kearney did the search pro bono in an effort to give back to the system –Parker and his children attended the University of Georgia – and to earn future business.<sup>43</sup>

On November 24 and December 7, 1993, the Executive Committee met in Executive Session to discuss the time line and procedures for the chancellor search and to name an advisory committee to assist in the process.<sup>44</sup> The members of the advisory committee included three presidents – Dr. Charles B. Knapp, University of Georgia; Dr. Billy C. Black, Albany State University; and Dr. Dorothy L. Lord, Brunswick College – three faculty members, three foundation/alumni representatives, the chair of the Student Advisory Council, and Acting Chancellor Harry S. Downs.<sup>45</sup> The chair and vice chair of the Board of Regents met with the advisory committee on December 17, and on February 17, 1994, the advisory committee met in the University System Office to review the preliminary short list of 20 candidates for the position.<sup>46</sup> There were originally 53

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<sup>40</sup> Minutes, 1993-1994, 131. 164.

<sup>41</sup> Ibid., 164.

<sup>42</sup> Tucker, March 14, 1994, 2.

<sup>43</sup> Parker, interview.

<sup>44</sup> Minutes, 1993-1994, 276.

<sup>45</sup> Ibid.

<sup>46</sup> Ibid.

candidates for the position.<sup>47</sup> However, the team at A.T. Kearney had considered nearly a thousand potential candidates across the country.<sup>48</sup> On February 18, the regents met as a Committee of the Whole in Executive Session to review the evaluations submitted by the advisory committee.<sup>49</sup> In that meeting, they cut the short list to ten. On March 1, 1994, the regents met again in Executive Session to review the references and other information about the ten candidates and further shortened the list to five.<sup>50</sup> None of the finalists were from the State of Georgia.<sup>51</sup>

Portch's resume received particular attention because, unlike the others, his letter of interest was hand-written. Since Portch had come into the search at the last minute and weather conditions in Wisconsin had further deteriorated after his trip to Chicago, he was unable to get to his office and did not have a computer or even a typewriter at home. Although he had copies of his resume on file, he had to write his letter of interest for the position by hand. "I was told afterwards by the regents that it's what made mine stand out and probably what resulted in [my being interviewed]," he said.<sup>52</sup> Regent Baranco's recollection is slightly different. "I am the reason that Stephen was hired," she said. "I saw one [letter] that was hand-written.... I read it in its entirety, and it was brilliant. It was absolutely brilliant.... [It] had been discounted by the all the people on the committee... but when you read it, it was absolutely brilliant."<sup>53</sup> According to Baranco, it was at her insistence that Portch was selected as one of the five candidates to be

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<sup>47</sup> University of Wisconsin System, "UW System Senior Vice President Stephen Portch Named Chancellor of University System of Georgia," news release, March 22, 1994. (This document is available in the files of the Office of Media and Publications in storage at the University System Office. A copy of this document is in the author's possession.)

<sup>48</sup> Tucker, March 14, 1994, 2.

<sup>49</sup> Minutes, 1993-1994, 276.

<sup>50</sup> Ibid., 277.

<sup>51</sup> Tucker, March 14, 1994, 2.

<sup>52</sup> Portch, first interview.

<sup>53</sup> Juanita Powell Baranco, interview by author, Atlanta, GA, May 30, 2007.

interviewed. Parker remarked that the letter was about three to four pages long and impeccably written.<sup>54</sup>



“He’s a great, great equestrian. No question about that. He can go from the Governor of the state, from royalty, down to mucking out the stalls. That’s Stephen Portch.”  
Regent Donald M. Leebern, Jr.

On March 10 and 11, 1994, the regents interviewed the five finalists at the offices of the Georgia Power Company.<sup>55</sup> Portch requested that he be interviewed last because he was wrapping up a strategic planning effort in the University of Wisconsin System on

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<sup>54</sup> Parker, interview.

<sup>55</sup> Minutes, 1993-1994, 277.

March 10.<sup>56</sup> When he arrived in Georgia that night, he called for Secretary Weber to bring minutes and other documents to his hotel room to prepare him for the interview. “I had pored over data about the state in preparation for the interview. I had read the minutes of board meetings [leading up to this point in time]. I had looked at the demographic trends and educational performance data of the state. When I did that, I started to see a picture of what the state needed, and it needed something very different from Wisconsin,” said Portch.<sup>57</sup>

What he likely learned from the minutes and local media was that system institutions were heavily lobbying their legislators for increased resources and status, bypassing their regents and the Board. Georgia Southern College and Valdosta State College had been promoted recently to regional university status with the aid of local legislators, and Columbus College, West Georgia College, and others were also vying to improve their status.<sup>58</sup> House Speaker Tom Murphy had been vocal in his opposition to the rampant mission creep and was quoted in the *Columbus Ledger-Enquirer* as saying, “I think we need to at least send a message to the regents that we in the General Assembly are in charge of the University System, and they can’t just keep creating colleges... without us knowing how much it’s going to cost us down the line.”<sup>59</sup> Among the documents Portch reviewed was a booklet of current legislators. He noted that none of them had beards, and an hour before his interview, he shaved his off.<sup>60</sup>

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<sup>56</sup> Portch, first interview.

<sup>57</sup> Ibid.

<sup>58</sup> Salzer, March 23, 1994, 10C.

<sup>59</sup> Ken Edelstein, “House Seeks More Control of Colleges,” *Columbus Ledger-Enquirer* (March 3, 1994).

<sup>60</sup> Baranco, interview; Parker, interview; Portch, first interview.



Portch in Georgia

During his first interview for the chancellorship, Portch introduced the idea of a strategic plan. He explained that he envisioned a plan that would take approximately five to seven years to implement and that he would see the plan through to its full implementation. “It was clear that the board was frustrated that they had a governor wanting to do very big things in higher education but he wasn’t willing to do it without a plan and without some ideas behind it.”<sup>61</sup> Although Portch was the only one of the finalists who was not a sitting president or chancellor, Parker characterized him as a candidate with “no runs, no hits, and no errors” and “unlimited untapped potential.”<sup>62</sup>

The regents were very impressed. Regent Phillips noted, “The higher education system in Wisconsin is very similar to the one in Georgia.... They are both states that have one board governing all of the components of the university system. Wisconsin

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<sup>61</sup> Portch, first interview.

<sup>62</sup> Parker, interview.



operates very much like we do.... We were impressed that Portch operated in a system that was very similar to the system here, and from what we could tell, he was a really outstanding administrator.”<sup>63</sup> “He came in and lit the group up,” said Regent Dwight H. Evans. “He had a great deal of experience for someone his age.”<sup>64</sup> Regent McMillan remarked, “I was impressed with his presence, with his apparent knowledge of educational issues and suggested responses about how some of them could be tackled, if you will. You know they say cream rises to the top? He just rose to the top of the list.”<sup>65</sup> Regent Baranco said, “Everything about education politics he knew about, and to this day, it stands as the best interview I’ve ever done.”<sup>66</sup> Parker recounts that Portch was so well prepared for the interview that one regent remarked to him afterward, “It was as if he’d been reading our mail.”<sup>67</sup> Secretary Weber recounted, “Kay Miller [who worked in public relations] called me. She said, ‘I bet they are going to [select] the fifth one. They are all in there howling at the things he’s saying.’”<sup>68</sup> Although the Board took no formal action at that meeting, the Portch interview, which lasted approximately two and a half hours, ended with a standing ovation.<sup>69</sup> The regents had found their man. Barbara Portch, however, had misplaced hers. She drove right past him at the airport when he returned home. She did not recognize him without the beard.<sup>70</sup>

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<sup>63</sup> Barry Phillips, interview by author, Atlanta, GA, July 13, 2007.

<sup>64</sup> Dwight H. Evans, interview by author, Atlanta, GA, September 13, 2007.

<sup>65</sup> Elridge W. McMillan, interview by author, Atlanta, GA, May 16, 2007.

<sup>66</sup> Baranco, interview.

<sup>67</sup> Parker, interview.

<sup>68</sup> Weber, interview.

<sup>69</sup> Baranco, interview, Portch, email, December 2, 2007.

<sup>70</sup> Baranco, interview; Portch, first interview.



Barbara and Stephen Portch

On March 16, 1994, Chair Barry S. Phillips and Regents S. William Clark, Jr., Dwight H. Evans, and Donald M. Leebern, Jr. flew on Regent Leebern's company jet to Madison, Wisconsin, to interview 16 of Portch's references.<sup>71</sup> When they arrived, they realized they had left their coats in Regent Evans' car in Atlanta.<sup>72</sup> Although it was not very cold by Wisconsin standards, the Georgia regents were certainly out of their element. Portch recounted, "There was ice on the lake outside the hotel and fishing huts and people driving trucks on the ice. So, the regents' eyes were [wide like] they were on a study abroad trip."<sup>73</sup> The regents had dinner with Portch in a restaurant overlooking Lake Mendota, and he felt confident that he was their top candidate.<sup>74</sup> The regents also had lunch at the Portches' home the following day. "Barbara did a lot of nodding her

<sup>71</sup> Minutes, 1993-1994, 277.

<sup>72</sup> Donald M. Leebern, Jr., interview by author, McDonough, GA, May 29, 2007.

<sup>73</sup> Portch, first interview.

<sup>74</sup> Ibid.

head with Don Leebern because she didn't understand a word he said," recounted Portch with a laugh.<sup>75</sup>

The regents' interviews in Wisconsin included Governor Tommy Thompson; President of the University of Wisconsin System, Kenneth "Buzz" Shaw; Chancellor of the University of Wisconsin-Madison, Katherine Lyall; legislators, staff members, and then Wisconsin Regent Erroll B. Davis, Jr., who currently serves as Chancellor of the University System of Georgia.<sup>76</sup> Of Portch's service in the UW System, Davis recollected, "He kept me appropriately up to speed on the issues, and he gave me always good, non-emotional and professional advice to the point where I felt very, very comfortable acting as his reference when he sought further employment as the System head in Georgia."<sup>77</sup> According to Parker, the delegation made a preliminary offer to Portch in the Governor's private conference room in the Wisconsin Capitol.<sup>78</sup> Of course, the official appointment would have to be made by election of the full Board. On March 17, the regents met as a Committee of the Whole and decided to invite Portch and his wife to the Special Meeting to be held on March 22 for a final interview.

On March 20, Steve and Barbara Portch attended a reception and dinner in their honor hosted by the regents at the 191 Club in Atlanta.<sup>79</sup> On March 21 at approximately 9:30 a.m., Chair Phillips escorted Portch to the Georgia Governor's Mansion to meet Governor Miller, who was preparing to leave for baseball's spring training.<sup>80</sup> Also in

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<sup>75</sup> Ibid.

<sup>76</sup> According to the minutes, a similar delegation visited Washington, D.C., to interview others about President Franklin D. Roosevelt of Howard University (277).

<sup>77</sup> Erroll B. Davis, Jr., interview by author, Atlanta, GA, October 29, 2007.

<sup>78</sup> Parker, interview.

<sup>79</sup> Itinerary for Stephen R. Portch. (Hereafter, this document will be referenced as "Portch, itinerary." This document is available in the files of the Secretary to the Board in a folder marked "Chancellor" in storage at the University System Office. A copy of this document is in the author's possession.)

<sup>80</sup> Ibid.; Portch, first interview; Steven W. Wrigley, interview by author, Athens, GA, July 10, 2007.

attendance were Regent Leebern and the Governor's Chief of Staff, Steve W. Wrigley.<sup>81</sup>

In his book, *Zell: The Governor Who Gave Georgia Hope*, Richard Hyatt paints a picture of this meeting that is consistent with the interviews conducted. He notes that Portch and Miller had both "prepared for meeting each other as if it were an exam."<sup>82</sup> By all accounts, this was a courtesy visit, and it is clear that Miller had refrained from involvement in the chancellor search; however, he did want to meet the person the Board had selected to lead the University System of Georgia. Miller stated:

My expectations were simple: provide strong leadership for high standards and for access and provide a clear plan for making our system one of the best in the nation. We had a set number of things in motion by then – like HOPE, like aggressive investment in new facilities, like [the Georgia Research Alliance] – but we needed someone to chart a comprehensive course. That's what I wanted him to do.<sup>83</sup>

According to Hyatt's book and the interviews conducted, Portch and Miller were compatible from the outset. "Miller candidly admits he was trying to close a deal. The search committee wanted Portch. It was more important that Portch be comfortable with the governor than the other way around."<sup>84</sup> Knowing that Portch was a Flannery O'Connor scholar, Miller pulled out a copy of one of her books. "I pulled out that Flannery O'Connor book because I wanted him to know that this was a governor who knows who Flannery O'Connor was," Miller is quoted as saying.<sup>85</sup> Portch is quoted as saying, "That spoke to me more than any rhetoric that anyone could say. He was demonstrating to me that he was a scholar. He connected with my intellectual interests, so I had a real sense that his interest and commitment to education was very real and

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<sup>81</sup> Leebern, interview; Portch, first interview; Wrigley, interview.

<sup>82</sup> Richard Hyatt, *Zell: The Governor Who Gave Georgia HOPE*. (Macon: Mercer University Press, 1977), 313.

<sup>83</sup> Miller, letter, September 11, 2007.

<sup>84</sup> Hyatt, 313.

<sup>85</sup> *Ibid.*, 314.

genuine.”<sup>86</sup> Similarly, Portch knew what Miller was looking for in a chancellor, and he spoke of his commitment to excellence in education and some of the ideas he had for attaining excellence in the University System of Georgia.<sup>87</sup>

Miller did, in fact, close the deal. “That [meeting confirmed] for me that this was probably going to be a unique opportunity,” said Portch.<sup>88</sup> “He was very clear in wanting to do some very significant things.” When Miller asked Portch how long his proposed strategic plan would take, Portch responded, “Well, we’d better show some immediate progress, but I’d say... we’d get an awful lot done in four and a half years.”<sup>89</sup> To this, the Governor roared with laughter because Portch was clearly implying that Miller would be reelected in 1994.<sup>90</sup> Although the meeting with Miller was relatively brief, Portch was sold on the chancellorship. While most accounts of this meeting were that it was of a courtesy nature, at least one interviewee felt that the Governor had the final word in Portch’s selection. Speaker Terry Coleman said, “Zell had a final say in picking him, and he should as Governor.”<sup>91</sup>

On the morning of March 22, 1994, during a special meeting of the Board of Regents, Portch was unanimously elected the ninth chancellor of the University System of Georgia, effective July 1, 1994.<sup>92</sup> At age 43, Portch was the youngest chancellor in the history of the University System of Georgia.<sup>93</sup> He was also the first chancellor in 29 years

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<sup>86</sup> Vickers, March 27, 1994, A4.

<sup>87</sup> Wrigley, interview.

<sup>88</sup> Portch, first interview.

<sup>89</sup> Ibid.

<sup>90</sup> Ibid.; Hyatt, 314.

<sup>91</sup> Terry Coleman, interview by author, Atlanta, GA, August 27, 2007.

<sup>92</sup> Minutes, 1993-1994, 274.

<sup>93</sup> Kathryn Hayes Tucker, “Can a Brit-Bred Don Cope in Bulldog Country?,” *Bill Shipp’s Georgia: A Weekly Newsletter on Government and Business*. Volume 7, No. 30. (March 28, 1994), 1.

to be selected from outside the System.<sup>94</sup> The previous one was George L. Simpson, Jr., who had been a high-ranking leader in North Carolina's university system and an administrator for the National Aeronautics and Space Administration. "Simpson brought Georgia's colleges to a new level of quality, and the regents are hoping the next chancellor will do the same – on a grander scale," read one local weekly.<sup>95</sup>

Following the election, the Board of Regents held a press conference. With regard to the institutions' lobbying for higher status, Portch stated that he wanted an objective analysis of what the System should look like in the next century and warned that the System would not achieve national preeminence if its resources were stretched too far.<sup>96</sup> He was quoted in *The Augusta Chronicle* as saying, "What can be harmful to a system is not knowing where you are going for the next five or six years."<sup>97</sup> He was further quoted as saying, "I don't like taking actions that are piecemeal. The whole beauty of the power of the system is to take action with a wide view and not with narrow views."<sup>98</sup> This statement would set a tone of working collaboratively as a system that would resonate throughout his chancellorship.

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<sup>94</sup> Tucker, March 14, 1994, 1.

<sup>95</sup> Ibid.

<sup>96</sup> Salzer, March 23, 1994, 12C.

<sup>97</sup> Ibid.

<sup>98</sup> Ibid.

### CHAPTER THREE: CREATING A VISION FOR THE SYSTEM

*“A pessimist sees the difficulty in every opportunity;  
an optimist sees the opportunity in every difficulty.”  
Winston Churchill*

On July 1, 1994, Portch began his official service as Chancellor of the University System of Georgia. He had publicly declared that he would visit all 34 campuses of the system within the first 100 days of taking office, and he began his first day of work with a visit to Atlanta Metropolitan College (Atlanta Metro).<sup>1</sup> Although Portch had visited other institutions prior to taking office, this visit was intended to send a signal to the System and the regents. He recalled that during one of his previous trips to Atlanta, he was driven from the airport by a regent. When he saw the sign for Atlanta Metro by the side of the interstate, Portch asked the regent whether that was one of the system’s institutions. The regent, who lived in Atlanta, said he thought so but he had never visited the institution. Portch said in his interview, “That comment made me decide that the very first campus I would [visit] would be Atlanta Metro.... I’d started my career at the smallest, most threatened, most vulnerable campus in Wisconsin. I know how that feels. I think a system is also judged by how strongly it supports the smallest or the weakest of its institutions.”<sup>2</sup> Little did he know, another of the system’s weakest institutions would soon need his support.

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<sup>1</sup>Portch, interview. Daniel, interview. Portch, itinerary.

<sup>2</sup>Portch, interview.

From July 5, to July 10, 1994, much of Southwest Georgia was under heavy rainfall from Tropical Storm Alberto, which caused the most severe flooding in Georgia history and created record high levels of the Chattahoochee, Flint, and Ocmulgee Rivers.<sup>3</sup> A memorandum from the chancellor to the Board of Regents dated July 7 indicated that several system institutions were at risk, but one of the system's four historically black colleges and universities (HBCU), Albany State College (Albany State), was in a particularly dire situation by virtue of the fact that it was built on the banks of the Flint River.<sup>4</sup> President Billy C. Black had moved library materials and student and financial records to higher levels, and equipment had been moved to wheeled tractor trailers in the event it needed to be moved to even higher ground.<sup>5</sup> Chancellor Portch's memorandum warned, "The river is expected to crest on Sunday, July 10, as much as five or six feet above the top of the levee. This means that most, if not all, buildings on the campus will be flooded by as much as ten feet of water."<sup>6</sup> Indeed, on July 10, the Flint River crested, and despite days of preparation and efforts to reinforce the levee, the devastation to the City of Albany and to Albany State was serious. "It was the most challenging stretch of time for me during my public career. The state was flooded, homes wiped out, lives destroyed, hundreds of millions of dollars of damage. It was an enormous human

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<sup>3</sup> "Tropical Storm Alberto," Our Georgia History. Available from [http://ourgeorgiahistory.com/ogh/Tropical\\_Storm\\_Alberto](http://ourgeorgiahistory.com/ogh/Tropical_Storm_Alberto); Accessed June 13, 2008.

<sup>4</sup> Memorandum by Dr. Stephen R. Portch, Chancellor, to Members, Board of Regents, regarding "Aftermath of Tropical Storm Alberto, July 7, 1994. (This document is available in the files of Thomas E. Daniel in the Office of External Affairs in a folder marked "Chancellor's Correspondence, July 1994." A copy of this document is in the author's possession.)

<sup>5</sup> Minutes of the Meetings of the Board of Regents of the University System of Georgia, 1994-1995, 2 (hereafter cited as "Minutes, 1994-1995").

<sup>6</sup> Memorandum, July 7, 1994.



tragedy,” said Governor Miller. On the ALSU campus, 36 of 38 buildings were flooded.<sup>7</sup> The first floor of each of those buildings was under water.

Following the flood, Arthur N. Dunning, who was serving as Interim Executive Vice Chancellor at the time, and Linda Daniels, who worked as a program manager in the system office of facilities, met with the leadership at Albany State, whom Dunning characterized as being certain that the college would not be rebuilt. “When you stopped and saw what was happening there, you could see right away a lot of the history,” said Portch. “Why did it flood? Well, it flooded it was built on was on the cheapest land, which was right next to the river.... So, I learned a lot very, very quickly from that experience, and I think it cemented my support for HBCUs for the education of minorities in this state.”<sup>8</sup> The campus community felt the flood would give the system an excuse to abolish it altogether. “I was struck by the palpable anger and suspicion in that meeting,” said Dunning.<sup>9</sup> However, Portch had already decided that the college would be rebuilt. Dunning recalled:

I was kind of surprised because he treated the campus as a university system entity without regard to color. He didn’t think about it. [He said,] this is a university system campus under severe stress, and we’re going to work with the governor and everybody else. What many people were expecting is much of this would be the black-white navigation that Southerners don’t seem to know how to do without putting that in the process. We just...we breathe it, live it, smell it, touch it. But he didn’t bring any of that to it. He said this is a university system entity; we’ve got to reconstruct it. We’ll build it bigger and better. People there didn’t believe that.<sup>10</sup>

They may not have believed it, but it would happen. President Black would carry this message to the public at a press conference in August. Under a banner that read,

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<sup>7</sup> Minutes, 1994-1995, 2.

<sup>8</sup> Portch, interview.

<sup>9</sup> Arthur N. Dunning, interview by author, Athens, GA, July 10, 2007.

<sup>10</sup> Ibid.

“Unsinkable Albany State,” Black declared, “We are going to rebuild this campus bigger, stronger, and better.”<sup>11</sup>

The first board meeting of Portch’s chancellorship and Regent Leebern’s chairmanship took place on July 12 and 13, 1994. “I would have much preferred a quieter and drier beginning, but the flooding has allowed me to see the spirit of Georgia in action. It has allowed me to see the strength of being a System as we marshal human and other resources from around the System to help our sister institutions like Albany State,” Portch said in his remarks to the board. “To the administration, faculty, and students at Albany State, we need to state our admiration for their fortitude and pledge our assistance. I will go to Albany State today to carry that message personally.”<sup>12</sup>

Following the board meeting, Chair Leebern and Chancellor and Mrs. Portch flew on Leebern’s jet to Tifton because they could not get to the campus from the Albany side of the river.<sup>13</sup> Upon viewing the devastation, “I felt like I had been hit in the stomach,” said Leebern, who had visited the campus on April 1, 1994, for its Founders Day Celebration.<sup>14</sup> He noted, however, that the campus was already in poor condition before the flood. “We should have been ashamed of ourselves – the citizens, the state, and the Board of Regents – for letting that school get in that sad shape. It was sad, the physical plant.”<sup>15</sup>

What another new leader might have seen as bad omen, Portch saw as an opportunity. “It was an opportunity very early on to demonstrate some things which I

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<sup>11</sup> “Chancellor, President Declare Albany State ‘Unsinkable,’” *Quitman Free Press* 118, no.33 (August 17, 1994): 8A.

<sup>12</sup> Ibid.

<sup>13</sup> Leebern, interview; Portch, interview; Minutes, 1994-1995, 3.

<sup>14</sup> Minutes, 1993-1994, 343.

<sup>15</sup> Leebern, interview.

thought were important. One was that a system has no value in and of itself, but a system has value if – and it's in the strategic plan – the whole is greater than the sum of its parts. So, when that happened at Albany, we were able to pull the resources of the system together to respond to that crisis.”<sup>16</sup> The Vice Chancellor for Facilities, Linda Daniels, who was very involved in the Albany recovery effort, echoed this statement, “He had the right presence. He went down in short order, but it wasn't just as though he completely shifted his focus from why he had come to Georgia in the first place.... He basically painted it for us ultimately as an opportunity.”<sup>17</sup> Portch immediately brought in James William “Bill” Ray, Senior Vice President for Administration and Finance at the Georgia Institute of Technology, a retired Major General and former U.S. Army Corps of Engineers administrator, to lead the Albany State recovery effort. Linda Daniels recounted:

Bill Ray from Georgia Tech physically located, took his Winnebago and located, down in Albany. I think that's probably one of the primary reasons that we at the system level were able to be successful in working with Albany State because you had a situation where the campus staff on the ground had to deal not only with the devastation of their institution, but most of the [Albany] staff... lived within the flood zone as well. So they were dealing with personal family crises and tragedies, and it wasn't like they could be on call 24/7 when they're trying to find a home and bail out their own houses.<sup>18</sup>

In a special meeting of the Board of Regents held on July 25, the Board authorized the chancellor to take actions necessary to continue the operations of Albany State in temporary facilities.<sup>19</sup> Additionally, Portch and 24 employees from the university system office in Atlanta went to Albany to help clean up the campus.<sup>20</sup> While the effort

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<sup>16</sup> Portch interview.

<sup>17</sup> Linda M. Daniels, interview by author, Decatur, GA, July 3, 2007.

<sup>18</sup> Ibid.

<sup>19</sup> Minutes, 1994-1995, 39-40.

<sup>20</sup> “Chancellor, President Declare Albany State ‘Unsinkable,’” August 17, 1994.

was more effective from a public relations perspective than having a tremendous effect on the campus itself, it sent a clear message that the system would rally behind the institution. Linda Daniels explained:

It was more of a camaraderie [and] empathy building exercise. The physical role that anyone played by going down there and scrubbing or bailing or cleaning was not nearly so valuable as the experience as a System Office employee of physically being present, of seeing what the folks in Albany had gone through and were going through and would be going through for some time to come, so that when we up in Atlanta begin to lose patience, we have this very concrete reminder of what it was like on the ground, and it made our empathy with the campus staff and students much more real over the long, very long and extended recovery time required. We were rebuilding for six years.<sup>21</sup>

Portch noted that this was not an easy political decision, but that he felt it was the right decision. “It was also for me a crash graduate seminar in Georgia racial politics,” he said. “Albany has a tough history of racial issues, and there were people very early on suggesting that this was an opportunity to do away with Albany State, since there were two institutions in the community, to not rebuild it.”<sup>22</sup> With the gubernatorial election coming up in November, Zell Miller was also under pressure from some camps to close down the HBCU and merge it with the predominantly white Darton College, which was a two-year system institution in Albany. Representative Terry Coleman was one who did not think the institution should be rebuilt. Of the Governor’s and Portch’s response to the situation, he said, “Disaster. He should have merged it. He had a chance to merge it with Darton, and he didn’t have the guts.... He had a chance there, and it could have been out of his hands. The governor might have [influenced the decision], but it was a great opportunity to merge the two schools. We basically rebuilt it in the flood plain.”<sup>23</sup>

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<sup>21</sup> Daniels, interview.

<sup>22</sup> Portch, interview.

<sup>23</sup> Coleman, interview.

“I thought he showed great courage in announcing about rebuilding it,” said Portch regarding the Governor’s stance. “This was not many weeks from the election, and he could have dodged that issue and left it just to us, but he didn’t.”<sup>24</sup> Governor Miller stated, “Ultimately Albany State wound up in good shape. There were a lot of discussions about what directions to take, and I think Portch handled these well – so I didn’t have to!”<sup>25</sup> Because of Portch’s quick response to the situation and with the leadership of Bill Ray, within a few weeks after the crisis, fall classes began on time in over 320 temporary classrooms.<sup>26</sup>

### Writing a Novel

Although Portch had begun setting the stage for it, the actual formation of the board’s new strategic plan began with the arrival Dr. Sidney H. (Sid) Bremer, Professor of Humanistic Studies at the University of Wisconsin Green Bay, who joined Portch in Georgia on August 1, 1994, and served until June 30, 1995, on loan from the UW System.<sup>27</sup> Bremer had served as Portch’s academic associate in the UW System when he was vice president of academic affairs. In this capacity, she shadowed him for six months as a sort of intern, acting, in her words, as “a fly on the wall” in his meetings with presidents and legislators, keeping a journal of his activities and interactions, and writing policy briefings.<sup>28</sup> During their time together in Wisconsin, Portch and Bremer developed

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<sup>24</sup> Portch, interview.

<sup>25</sup> Miller, letter.

<sup>26</sup> Portch, inaugural address.

<sup>27</sup> Memorandum of agreement between the University of Wisconsin-Green Bay and the University System of Georgia, September 2, 1994. (This document is from the personal files of Sidney Bremer. A copy of this document is in the author’s possession.)

<sup>28</sup> Sidney H. Bremer, interview by author, Green Bay, Wisconsin, June 29, 2007.

a good working relationship, which is one reason he asked her to join him as his special assistant for his first year as chancellor of the University System of Georgia to assist specifically in the creating the strategic plan. Bremer explained:

[Portch's] skill at figuring out what other people could do and what would appeal to them was very strong. So he described this as also involving drafting speeches for him, and doing some correspondence along the way, but most importantly, he described this as 'writing a novel.' The planning was going to be writing the novel.... We would develop a general structure to begin with... and we'd have a clear understanding of the cast and characters we were working with, and then, the action would unfold, chapter by chapter, and we might not necessarily know exactly where it was going to go except for the overall structure. So, it was appealing to me as one English professor to another... the idea that we were going to be writing a novel....<sup>29</sup>

The earliest stage of the strategic planning process was centered on collective brainstorming and fostering engagement. It began at noon on Tuesday, August 9, 1994, when system office staff members were invited to a brown-bag lunch to begin discussions on the strategic plan and vision.<sup>30</sup> At the meeting, Portch announced that his charge was to develop a strategic plan in nine to ten months and that some pre-planning had already begun, including a labor needs analysis.<sup>31</sup> He stressed that the strategic planning process would need Board of Regents agreement, and he laid out what the plan itself would look like. It would be a brief document, approximately 8 to 15 pages, plus attachments, including a vision statement, one to two pages long with some "sweet potato pie" and poetry, which would be ready for board approval by the September meeting.<sup>32</sup> Bremer explained that "sweet potato pie" was Portch's way of saying that the vision should reflect the flavor of Georgia's character and aspirations. "Steve was very good at

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<sup>29</sup> Bremer, interview.

<sup>30</sup> Memorandum by Stephen R. Portch, Chancellor, and Arthur N. Dunning, Acting Executive Vice Chancellor, to Central Office Staff, August 4, 1994. (This document is from the personal files of Sidney Bremer. A copy of this document is in the author's possession.)

<sup>31</sup> Sidney Bremer, "8-9-94 Brown Bag Overview," personal notes. (This document is from the personal files of Sidney Bremer. A copy of this document is in the author's possession.)

<sup>32</sup> Ibid.

adopting references to Georgia... and, he was also very good at not saying, 'Here's how we used to do it in Wisconsin,'" she said. "He would talk about his previous experience, but that was phrase he used: 'In my previous experience, I've found that such and such....' So, he kept the focus on Georgia and taught me to do that as well."<sup>33</sup> The strategic plan would include guiding principles to provide a basis for decision making and prevent ad hoc and potentially contradictory decisions.<sup>34</sup> Portch estimated the principles would be developed and approved between October and December.<sup>35</sup> Goals would be developed by June 1995, and those goals would be measurable where possible.<sup>36</sup> Implementation would take place the following fiscal year, and responsibility for implementation would be delegated to the institutions with principled bases for their decision making and accountability.<sup>37</sup>

Portch explained to the staff that the strategic planning process would begin with brainstorming sessions with the vice chancellors and presidents and continue with an August meeting of the Board of Regents to discuss the elements that should go into the vision statement and issues that should be addressed by the strategic plan.<sup>38</sup> He explained that he would avoid having the regents talk, think, and write on the same day, but that Bremer would take their ideas and massage them into a draft of the vision statement, possibly with the inclusion of commentary by students, faculty members, and campus administrative leaders.<sup>39</sup> The principles and goals of the plan would develop from further discussions with the regents, but the implementation phase would need a more elaborate

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<sup>33</sup> Bremer, interview.

<sup>34</sup> Bremer notes, "8-9-94 Brown Bag Overview."

<sup>35</sup> Ibid.

<sup>36</sup> Ibid.

<sup>37</sup> Ibid.

<sup>38</sup> Ibid.

<sup>39</sup> Ibid.

structure and would involve working groups.<sup>40</sup> The first year of the strategic planning would be very intense, with implementation to follow the second year and institutionalization to occur over time.<sup>41</sup>

Portch gave some examples of issues the strategic plan might address and how. Some of the issues he highlighted included professional development and increasing the number of Georgians with bachelor's degrees.<sup>42</sup> He also introduced the topic of institutions' desiring a "change of status," explaining that the terminology implies a hierarchy. He said that in his campus visits, he would try to shift focus from growth to quality at the campuses and remarked that a superb two-year college was more valuable than a mediocre four-year college.<sup>43</sup> He noted that the term "regional university" was unique to Georgia and should not be a sacred cow.<sup>44</sup> Probably the most complex issue would be the system's relationship with the Department of Technical and Adult Education (DTAE), he surmised, because the system did not have full control over that issue.<sup>45</sup> In his closing remarks to the staff, Portch reminded them, "We do not work for the state, but for the students and the university."<sup>46</sup> He said that he would stress this also in his campus visit.

Following the staff meeting, Portch met with the vice chancellors with a similar agenda.<sup>47</sup> He began by stating that a mission is where the system is and what its current

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<sup>40</sup> Ibid.

<sup>41</sup> Ibid.

<sup>42</sup> Ibid.

<sup>43</sup> Ibid.

<sup>44</sup> Ibid.

<sup>45</sup> Ibid.

<sup>46</sup> Ibid.

<sup>47</sup> Sidney Bremer, "8-9-94 VC's Meeting on Vision," personal notes. (This document is from the personal files of Sidney Bremer. A copy of this document is in the author's possession.)



responsibilities are, while a vision is where the system is going.<sup>48</sup> As an example, he said that the University System of Georgia would be a preeminent public university system whose whole is greater than the sum of its parts and would be recognized nationally for the comprehensive array of its academic programs, the excellence of its faculty, etc., and it would be governed by a board focused on policy development.<sup>49</sup> He remarked that the vision could be structured by teaching, research, and service and that it could have elegant opening and closing paragraphs with a bulleted body.<sup>50</sup> He again noted that it should have some poetry in it.

Then, he engaged the vice chancellors in a discussion about possible themes for the vision. Bremer explained, “Steve believed in brainstorming in smaller groups, without getting closure, without critiquing what was coming on, but just kind of gathering ideas.”<sup>51</sup> She further stated, “He was also getting people to talk about what they considered to be issues that we needed to work on as a university system, and the system office staff had already input on that through a survey that he had done early in his tenure.”<sup>52</sup> (In a memorandum to Portch dated August 15, 1994, Bremer summarized and responded to the staff survey responses, which focused almost exclusively on system office cultural and professional issues and little to not at all on systemwide strategic issues.<sup>53</sup>)

One of the themes discussed among the vice chancellors and the chancellor was excellence in that the system would hold students and faculty to higher standards and

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<sup>48</sup> Ibid.

<sup>49</sup> Bremer notes, “8-9-94 VC's Meeting on Vision.”

<sup>50</sup> Ibid.

<sup>51</sup> Bremer, interview.

<sup>52</sup> Ibid.

<sup>53</sup> Memorandum from Sid Bremer to Steve Portch regarding “Staff Surveys,” August 15, 1994. (This document is from the personal files of Sidney Bremer. A copy of this document is in the author’s possession.)

aspire to national preeminence.<sup>54</sup> It was noted that the system should seek a balance between achieving national preeminence, improving quality of life at the community level, and providing effective undergraduate education.<sup>55</sup> They also discussed various issues related to students, educational attainment, technology, economic development, institutional missions, and the system's relationship to the Georgia K-12 system and DTAE.<sup>56</sup> Portch noted that the board and the system would be accountable for the achievement of their vision; therefore, it needed to be credible and achievable, not overpromising.<sup>57</sup> He then asked what the vision should aim to enable or stop.<sup>58</sup> The issue of "mission creep" was introduced, and the chancellor responded that the system should have an array of units and value different missions, and each institution should register in people's minds for some outstanding attribute.<sup>59</sup> He expressed that the system did not need to expand as there was established geographical access around the state; however, he felt students should be able to get high-quality freshman-sophomore education anywhere and that he would not tolerate mediocrity.<sup>60</sup> He also stated that the system needed to seek greater economic and academic efficiency.<sup>61</sup>

On Friday and Saturday, August 12 and 13, Portch held a presidents' retreat on St. Simon's Island. He set the tone for the retreat in an August 1 memorandum in which he stated that he intended "to use meetings with presidents for substantive policy

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<sup>54</sup> Bremer notes, "8-9-94 VC's Meeting on Vision."

<sup>55</sup> Ibid.

<sup>56</sup> Ibid.

<sup>57</sup> Ibid.

<sup>58</sup> Ibid. (Interestingly, Bremer's notes here say in parentheses, "a question SP will NOT ask BR.")

<sup>59</sup> Ibid.

<sup>60</sup> Ibid.

<sup>61</sup> Ibid.

discussions.”<sup>62</sup> Setting the tone for the retreat, Portch wrote, “This will be informal and semi-chaotic. We will use flip-sheets. You need to bring only your ideas and creativity. I am asking you to contribute from a University System perspective, not necessarily from a campus-only perspective.”<sup>63</sup>

The memorandum also set the agenda for the retreat, which began on Friday morning with a presentation by Portch of the “Rules of Engagement, Code of Conduct, or How to Get Along with the New Chancellor,” which I will discuss in detail in my chapter on Portch’s leadership style. This presentation was followed by a discussion of the presidents’ ideas for major new budget initiatives to propose in the next legislative session. In his memorandum, Portch requested, “To the maximum extent possible, these should be ones that benefit the entire System. Try to estimate a rough costing.”<sup>64</sup> After lunch on Friday, the agenda resumed with a presentation by Portch on the process and politics of strategic planning, followed by a discussion with the presidents of items that should be included in the system’s new vision statement. On Saturday morning, the presidents resumed their strategic planning discussion with issues that should be covered and guiding principles.

For Portch, the presidents’ retreat was a dress rehearsal for the upcoming regents’ retreat.<sup>65</sup> The presidents broke into two groups and made lists on flip charts of ideas they had for themes and issues that should go into the vision statement and guiding principles. Then, they used colored dot stickers to vote on the issues that were most important to

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<sup>62</sup> Memorandum from Stephen R. Portch, Chancellor, to Presidents, University System, regarding “Our Retreat,” August 1, 1994. (This document is from the personal files of Sidney Bremer. A copy of this document is in the author’s possession.)

<sup>63</sup> Memorandum from Portch to Presidents, August 1, 1994.

<sup>64</sup> Ibid.

<sup>65</sup> Bremer, interview. Stephen R. Portch, interview by author, telephone, March 21, 2008 (hereafter cited as “Portch, second interview”).

them. In a memorandum to the presidents dated August 18, 1994, Portch wrote, “There was good thinking going on around those flip charts!”<sup>66</sup> Attached to the memorandum was the following list of vision themes identified by the presidents at their retreat:

- Academic EXCELLENCE, insuring ACCESS and QUALITY
  - National standards and reputation
  - Undergraduate teaching priority
  - User-friendly campuses
- WHOLE GREATER THAN SUM OF PARTS
  - Varied, distinct missions
  - Culture of collaboration
  - Incentives for innovation
- INCREASED EXPECTATIONS
  - Raising student aspirations/performance
  - Faculty/staff development
- Preparing students to EXERCISE LEADERSHIP
  - Able to use the technology innovatively
  - Able to advance beyond entry level
  - Ready for a global, multi-cultural reality
  - Motivated and skilled toward lifelong learning
- ACTIVE STATE PARTNER
  - Promote larger definition of economic development
  - Delivering basic and applied research statewide
- Continuous ASSESSMENT and IMPROVEMENT
  - Increased VALUE for role of higher education<sup>67</sup>

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<sup>66</sup> Memorandum from Chancellor Stephen R. Portch to Presidents, University System, regarding “Retreat Follow-Up,” August 18, 1994. (This document is from the personal files of Sidney Bremer. A copy of this document is in the author’s possession.)

<sup>67</sup> “Summary of Presidents’ Vision Themes from Advisory Council Retreat – August 14, 1994” (sic). This list was most likely compiled by Bremer.

At 10:00 a.m. on August 17, 1994, 13 regents attended a special called meeting at the Jolley Lodge, located on the campus of Kennesaw State University.<sup>68</sup> The only two actions taken at the meeting were handled at the opening of the meeting – the approval of the July 1994 minutes and the appointment of President Beheruz N. Sethna at West Georgia College.<sup>69</sup> The real purpose of this meeting was a strategic planning retreat. As Chair of the Planning and Oversight Committee, Regent Thomas F. Allgood, Sr. made opening remarks in which he “urged the Regents to start afresh, without regard for discussions from previous meetings on the subject, to submit any thoughts concerning the future of the University System, to keep the concepts general for the present with details to be worked out at future meetings.”<sup>70</sup> Although he was assisted by Dr. Bremer and Acting Executive Vice Chancellor Arthur N. Dunning, Chancellor Portch facilitated the retreat himself.<sup>71</sup> Regent Baranco said,

The reason the Portch plan worked, I think, was because he facilitated the strategic planning workshop himself.... There are very few leaders, I think, who have the skill set to actually facilitate the strategic plan..... He was having to be objective as an outside facilitator knowing at the same time he has got to live by whatever we come up with. So there’s a great temptation to dictate the mission statement, to dictate what the strategic plan is going to be, and he resisted that and came up with a very workable strategic plan.<sup>72</sup>

Portch stated at the outset that the plan would be the regents’.<sup>73</sup> In a brief introduction to the retreat, Portch explained that the strategic plan should be “short, clear, compelling, and guiding, in addition to being future-oriented and understandable to the

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<sup>68</sup> Regents Joel H. Cowan, Dwight Evans, and Edgar L. Jenkins were excused from the meeting. (Minutes, 1994-1995, 41.)

<sup>69</sup> Minutes, 1994-1995, 41.

<sup>70</sup> Ibid., 42-43. Note, in his first interview, Portch said that the Regents had engaged in a strategic planning effort with a private consultant the previous year and characterized it as a “legendary flop.”

<sup>71</sup> Minutes, 1994-1995, 43.

<sup>72</sup> Baranco, interview.

<sup>73</sup> At both the Presidents’ and Regents’ retreats, Portch engaged participant in warm-up exercises “as an aid to changing their frames of references for the moment.” (Minutes, 1994-1995, 43.)

state's citizens (free of educational jargon)."<sup>74</sup> He identified four phases of the planning process as follows: "(1) a one-page vision statement that is both lucid and poetic, (2) approximately two dozen guiding principles to guide all future decisions, (3) goals that are measurable, and (4) implementation strategies, which may require the addition of new policies, the revision of old ones, or a delegation of responsibility to institution presidents."<sup>75</sup> In his introductory remarks, Portch set a timeline for the rollout of the Strategic Plan: "**Principles** [would] be considered during the coming fall and winter months, **Goals** in the spring, and **Implementation** during 1995. In 1996, deeper **Institutionalization** [would] be needed for the full Plan."<sup>76</sup> He implored the regents to think of the "big picture" rather than getting into specifics in order to get a sense of the direction in which the system should go and what issues needed attention.<sup>77</sup> Finally, he characterized this meeting as "the day we began the climb to the pinnacle."<sup>78</sup>

As with the presidents, the regents used flip charts and broke into two groups, or "think tanks," led by Regent Allgood and the Vice Chair of the Board, Juanita Powell Baranco. The Chair of the Board, Donald M. Leebern, Jr., floated between the two groups. In the morning, the groups discussed elements of the vision statement, a draft of which would be brought for consideration at the board's next meeting.<sup>79</sup> In the afternoon, the groups discussed matters to be addressed by the strategic planning process overall. "He said again he wanted... a brainstorming exercise without discussion and without argument," said Bremer of the regents' retreat.<sup>80</sup> Regent Baranco corroborated this point,

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<sup>74</sup> Minutes, 1994-1995, 43.

<sup>75</sup> Ibid.

<sup>76</sup> Ibid.

<sup>77</sup> Ibid.

<sup>78</sup> Ibid, 44.

<sup>79</sup> Ibid.

<sup>80</sup> Bremer, interview.

saying, “We didn’t outline every detail on how to address it right then. So the beauty of that was the flexibility that was built into the plan.”<sup>81</sup> Portch said, “I think for the regents, it was a really important experience because to them strategic planning previously had been about starting at the end instead of at the beginning. It was about ‘What campuses should we make regional campuses?’ ... and not about ‘What’s the end game?’ and ‘What are the metrics we’re going to use?’ So, we took a step back.”<sup>82</sup>

Portch sought to foster a sense of agreement among the regents. He said, “They were talking among themselves. Before that time, there had been a bit of a split board because there were still former governor’s appointees and new governor’s appointees. It really came together that day. They came up with a lot of ideas, and we got all the key issues documented.”<sup>83</sup> However, the ideas were not necessarily the regents’ alone. “The template came from the chancellor and his staff, which included some input from the other constituencies within the system.... When the document came to us, there had been some degree of consensus... from the bottom up, if you will,” recollected Regent McMillan. “We did not sit there and articulate the things that were going in the plan. We more or less responded to, reacted to, and our tweaking might have resulted in some things being taken out, but it was not *we* who came to the table with ideas, no.”<sup>84</sup> Similarly, Regent Leebern said, “Stephen was great about, at the end of the day, all the things that he said, which were wonderful, you felt like it was your vision and it wasn’t, but he had the ability to do that.”<sup>85</sup>

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<sup>81</sup> Baranco, interview.

<sup>82</sup> Portch, first interview.

<sup>83</sup> Ibid.

<sup>84</sup> McMillan, interview.

<sup>85</sup> Leebern, interview.

A list of the critical issues identified by the two “think tanks” was compiled by Bremer, who would be responsible for ultimately drafting the vision statement and guiding principles. She said:

It was my job to kind of put together what came from the various groups and try to make master lists for us to keep in mind.... But, my first job was to take those themes and to work them into this one-page vision statement, and I have to admit of all the things that I did during the year, that’s the one I enjoyed the most. You know, Steve’s invitation to include some poetry and make sure it had some ‘sweet potato pie’ was just what I wanted to hear, so I had a lot of fun with that.<sup>86</sup>

Of Bremer’s responsibility for drafting the vision, Portch said, “Sid was a prolific and absolutely super word crafter and synthesizer. All of her training and her intellect made that a great, great strength of hers. So, she was able to capture in short order what we’d heard that day in a coherent way.”<sup>87</sup> Many of the ideas in the regents’ lists echoed the issues brought forward by the presidents at their retreat, and common themes began to emerge. The theme that was most prominent among the regents was national preeminence.<sup>88</sup> In his August 18, 1994, memorandum to the presidents, Portch recounted, “When I heard how closely [the regents’] themes were paralleling your own, I put up a flip-chart summary of what stood out by way of consensus from our St. Simons’ dialogue. I wish you could have seen the smiles all around as the Regents saw how close we all are in our central commitments and concerns.”<sup>89</sup> This is how Portch worked to build consensus among the regents and the presidents. Secretary to the Board Gail S. Weber stated, “He said, ‘All of you want exactly the same thing, and he listed them.

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<sup>86</sup> Bremer, interview.

<sup>87</sup> Portch, interview.

<sup>88</sup> Bremer, interview.

<sup>89</sup> Memorandum from Portch to Presidents, August 18, 1994.



Maybe there were ten things that [the regents] wanted, and he made [the regents] look so good. And they were all for all those things he said they'd said that should be done."<sup>90</sup>

The themes developed out of the regents' strategic planning retreat appeared in *The Atlanta Constitution* the following day, as follows:

- Ensure academic excellence.
- Encourage collaboration among schools with programs such as distance learning and remove some of the competitiveness.
- Make sure students are offered programs that prepare them for more than one job.
- Encourage each school to set a mission statement that emphasizes its individuality.
- Improve relationships with governmental units and business organizations.
- Increase opportunities for universities to prepare students for the international market.<sup>91</sup>

The article quoted Portch as saying, "The key here is it must be the board's plan; they must have ownership."<sup>92</sup> It also noted that the regents' suggestions were in line with those of the presidents and that Portch was listening to "hundreds of others in the community, including legislators and professors."<sup>93</sup> The Chair of the Board, Donald M. Leebern, Jr., was quoted as saying, "We've got to have good team players; that's what

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<sup>90</sup> Weber, interview.

<sup>91</sup> Wisniewski, Laura. "Regents Offer 'Visions' for University System," *The Atlanta Constitution* (August 18, 1994). (This article was mailed to the presidents along with the memorandum from Portch on August 18, 1994. This document is from the personal files of Sidney Bremer. A copy of this document is in the author's possession.)

<sup>92</sup> Ibid.

<sup>93</sup> Ibid.

it's all about to make this successful.”<sup>94</sup> Again, there was an emphasis in the message that this would be a team effort, inclusive of many participants.

Following the board retreat, the next step in the strategic planning process was for Bremer to draft the vision statement. It was her skill of filtering out what should end up in the vision statement that earned her the title “Sid the Sieve” from Vice Chair Baranco.<sup>95</sup> With regard to the drafting, Portch gave Bremer a great deal of creative freedom. She said, “I had a sense when I was drafting things that the general tone, the voice, the overall package was in my control and coming out of what I was able to do, and he did fine-tuning and he always kept his notion at fine-tuning.”<sup>96</sup> The draft vision statement was sent to the presidents and the regents for their review and feedback prior to its discussion when the regents met as the Planning and Oversight Committee following the September Board meeting to further work on the vision statement. The process was very iterative and inclusive. Bremer referred to it as “feedback loops.”<sup>97</sup> Portch said, “[I] deliberately encouraged [the regents] to noodle with it, change it so that they’d have their own fingerprints and ownership over it. So, we were not the least resistant if they wanted to change an item. They changed very little, but they definitely took ownership of the vision statement.”<sup>98</sup>

In an editorial titled “An Aristocracy of Everyone” dated September 30, 1994, *Atlanta Journal-Constitution* writer Doug Cumming stated, “The Georgia Board of Regents has hammered out a philosophical statement worthy of the word ‘vision.’”<sup>99</sup> In

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<sup>94</sup> Ibid.

<sup>95</sup> Portch, first interview; Bremer, interview; Memorandum from Portch to Presidents, August 18, 1994.

<sup>96</sup> Bremer, interview.

<sup>97</sup> Ibid.

<sup>98</sup> Portch, first interview.

<sup>99</sup> Doug Cumming. “An Aristocracy of Everyone,” *The Atlanta Journal-Constitution* (September 30, 1994), A12.

the editorial, Cumming highlighted two central themes in the vision. First, there should be linkages between higher education and the K-12 system, and second, community service should be central to educational experience. In closing, he wrote, “Let public higher education invigorate every level of education, and let it embrace teaching citizenship in a democracy.”<sup>100</sup> Bremer keeps this editorial as a cherished keepsake in her scrapbook from the year she spent in the University System of Georgia, and she highlights the Vision Statement as the greatest accomplishment of that period in her career:

The one that gave me the most pleasure was simply the vision statement. There are no two ways about that.... Part of the pleasure was the *Atlanta Journal-Constitution* actually coming up with that article where it quoted that vision statement. My sense [was] that it was my work that was getting public recognition. I’m an English professor. That had never happened to me before. I sent off scholarly articles, and they were published in journals and sometimes you never hear anything more about them. And here was some work that I had really put blood, sweat, and tears into, and it had been recognized, not by name, that didn’t matter, but simply the product was there. And I really felt that it worked. For that whole year, we could keep coming back to the vision statement and what we needed to do was there, was supported by the vision statement. The vision statement had proved itself out. We thought it was good. Yeah, that would have to be number one.<sup>101</sup>

On October 12, 1994, the day of Chancellor Portch’s inauguration, the Board of Regents adopted its official vision statement:

Access to Academic Excellence for the New Millennium:  
A Vision for the University System of Georgia

As Georgia emerges as a leader in a global society, the University System of Georgia will lead in access to academic excellence. Among the nation’s public universities and colleges, Georgia’s will be recognized for first-rate undergraduate education, leading-edge research, and committed public service. Georgians will appreciate the System’s prestige and leadership in public higher education, including its graduate and professional programs, as fundamental to the state’s economic, social, technological, and cultural advancement. The University

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<sup>100</sup> Cumming, A12.

<sup>101</sup> Bremer, interview.

System of Georgia and its component colleges and universities will sustain close contact with the people of Georgia, be responsive to the needs of Georgians first and foremost while raising their aspirations, and generate a more highly educated populace throughout the state. It will seek to create for students from various backgrounds every possible avenue to intellectual achievement without compromising academic excellence, and challenge them to their full potential for leadership. Its students, who are its heart and soul, will therefore be its strongest supporters.

To these ends, the University System of Georgia will be characterized by:

- A whole that is greater than the sum of its parts, in which each campus has a clearly focused and valued mission, and all contribute their strong, bright threads to a network of programs that covers Georgians' diverse needs for higher education.
- Students who master their majors and the basic skills of critical reasoning, independent thinking, computation, communication, collaboration, and creativity needed to enter the workplace with confidence, to move beyond entry-level jobs, to pursue lifelong learning, and to exercise leadership as contributing citizens who advance their families, communities, state, nation, and world into the new millennium.
- A world-class, diverse faculty and staff who have superior communication and teaching skills; who use new technologies, roles, and curricular innovations creatively to enhance student learning; and who exhibit the highest standards of intellectual achievement and continuing growth, social responsibility, and concern for students.
- Active partnerships with business and industry, cultural and social organizations, and government in order to analyze, project, and respond to changing state and regional needs, to support Georgia's economic and cultural development and to insure that its graduates are prepared for the future.
- Campus learning communities that engage students with the ideas that mark educated persons, global and multicultural perspectives, and advanced technology to develop both ethical principles and intellectual flexibility for the world of tomorrow; and that celebrate and energize the student spirit, while respecting and supporting the different ways students develop their minds, their persons, and their citizenship.
- Leadership in establishing higher state standards for post-secondary education and--with the public schools and technical institutes--in improving and valuing education at all levels, helping students move smoothly within the System and from one educational sector to another, and insuring that all

students who enter the University System are prepared to succeed.

- A Constitutional Board of Regents that establishes clear policies and review procedures to promote the continuing improvement of every unit and of the System as a coordinated whole, that encourages initiative and innovation throughout the System, that requires full accountability from all, and that insures responsible stewardship.

The University System of Georgia will hold itself accountable to the citizens of Georgia for the effective and efficient use of every available material resource, new technology, and human insight and activity to achieve access to academic excellence for all citizens, and to charge its collective intellectual power on behalf of the state.<sup>102</sup>

Following this board meeting, Stephen Portch was inaugurated as the ninth chancellor of the University System of Georgia in the Georgia House Chambers.<sup>103</sup> By the time of his inauguration, Portch had visited all 34 institutions of the system, as promised. The point of his campus visits was not only to meet the presidents, campus leaders, and local legislators, but also to set the tone for the upcoming strategic plan. “That was really the intent, to get out there and to let people know that it was basically a new day,” said Portch. “There was going to be a plan, and it was going to be a different plan from the past. The university system could all become stronger and better if we have a common vision and plan.”<sup>104</sup>

Portch began his inaugural speech by reminding the audience that their presence symbolized “the partnership we must forge to meet our goal of national preeminence.”<sup>105</sup> He then threw in a bit of the characteristically dry humor that he would become known for when he noted, “The *Oxford English Dictionary* tells us that in 1066 a chancellor was

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<sup>102</sup> Minutes, 1994-1995, 121-122.

<sup>103</sup> Portch, inaugural address.

<sup>104</sup> Portch, first interview.

<sup>105</sup> Portch, inaugural address.

‘a petty official, guardian of infants, lunatics, and idiots.’ Not much has changed!”<sup>106</sup>

However, he also used his inauguration to set the tone for the board’s strategic plan. In his inaugural address, he said, “To the Presidents, faculty, staff, community supporters and – most of all – to our students, your presence here today symbolizes the partnership we must forge to meet our goal of national preeminence.”<sup>107</sup> Portch also remarked on the newly adopted Vision Statement:

We know where we want to go. We have a vision. It is a vision that in the words of the poet, Muhammad Ali, ‘floats like a butterfly and stings like a bee.’ It is a vision that tells the people of Georgia what we will do for them, not what they should do for us. This is the people’s University System. If our vision is our sight, then our action must be our touch. We must touch the lives of every citizen in the state. In doing so, we must make wise decisions based on educational need and not on political expediency – for as Mark Twain said, ‘When in doubt, do what is right! It will please some and astonish the rest.’ As we do right, we must deliver on our vision.<sup>108</sup>

In his address, Chancellor Portch also emphasized his strategic theme of collaboration and announced the establishment of the Chancellor’s Award for Collaboration:

So what will it take to get us there? It will take partnerships. It will take collaboration to succeed. In forming partnerships, it is helpful to follow the Native American proverb that you need to ‘walk a mile in someone else’s moccasins.’ If you understand the needs of others – be they students, Regents, Presidents, faculty, staff, legislators; or be they persons of other gender or color – then you can forge meaningful partnerships. We must shift from the culture of competition to the culture of collaboration. Barbara and I pledge our personal commitment to excellence and collaboration, and to symbolize that, we have established a Chancellor’s Award of \$1,000 for a person demonstrating these qualities<sup>109</sup>

Portch announced that the first recipient of the Chancellor’s Award for Collaboration was General Williams Ray, who had led the Albany recovery effort. In his first interview, Portch said, “I just wanted to signal that collaboration was an important value to the

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<sup>106</sup> Ibid.

<sup>107</sup> Portch, inaugural address.

<sup>108</sup> Ibid.

<sup>109</sup> Ibid.

system, and previously, most awards were either individually based or institutionally based. We wanted to recognize people who were prepared to work across campuses for the common good. Of course, Bill Ray was just a natural.”<sup>110</sup>

Also in his inaugural address, Portch highlighted the Vision Statement’s theme of “access to academic excellence,” a theme that would ultimately evolve into the Policy Direction on Admissions. He remarked:

We can – and we must – have both access and excellence. Some worry that raising expectations of students results in a redirection of access. But access without excellence is no access at all. It is a fraud. In the words of the Arabian proverb, ‘He promised me earrings, but he only pierced my ears.’ We need to be partners in helping students come to us prepared to succeed. We need to reach out to retain students through graduation. The research is clear: communicate your expectations; students will meet your expectations. Let us give our students that hope, that respect.<sup>111</sup>

Finally, Portch touched on a theme in the Vision Statement that would become the Mission Development and Review Policy Directive, a Systemwide effort to make the best use of each institution by better defining its unique role in the System as a whole:

Let us be focused. Let us have 34 campuses that are distinctive. Let us have diversity in our people and in our programs. Let us have strength and rigor in all that we do, from the students we teach, to the research we conduct, to the service we provide. You know Emerson once met Thoreau on a street in Concord and boasted to him, “Harvard’s a great school. They teach all the branches of knowledge there.” Thoreau shot back, “Yes, they teach all the branches, but none of the roots.” We will teach the roots. We will nurture our students. We will be student centered.<sup>112</sup>

Portch concluded his remarks with students as his focus while alluding again to his theme of collaboration:

Let me end with our students in the center. Let me end with the immortal and poetic words of Sylvester Stallone in *Rocky IV* (I’ve pulled out all the literary greats for this occasion!): ‘Ya gotta do what ya gotta do.’ Let’s do it. And let’s do

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<sup>110</sup> Portch, first interview.

<sup>111</sup> Portch, inaugural address.

<sup>112</sup> Ibid.

it together. This is the time. This is the place. We are the people. We are the partners who can provide access to excellence, for you, your children, your grandchildren, and for future generations of Georgians. Let's do it. Thank you so very much.<sup>113</sup>

Of Portch's inaugural address, Regent Evans remarked, "To me, it was one of the two best speeches I've ever heard given. [The other] was John Kennedy's inaugural address."<sup>114</sup>

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<sup>113</sup> Ibid.

<sup>114</sup> Evans, interview.



## CHAPTER FOUR: CHARTING THE COURSE

Just as Portch had coquettishly predicted at their first meeting, Zell Miller was reelected as Governor of the State of Georgia on November 9, 1994. His reelection would be critical to the success of the strategic plan, especially in terms of budgetary support. Meanwhile, the Board of Regents was considering a draft set of guiding principles as a foundation for future policy making, which would evolve out of the recently approved vision statement.<sup>1</sup> In his remarks to the board at that November meeting, Chancellor Portch characterized the University System of Georgia as “a good system poised to be a great system,” and he was certainly doing his best to chart the course.<sup>2</sup>

While things were moving rapidly at the board level, they were moving just as rapidly if not more so at the system office and campus levels, and Sid Bremer remained the linchpin in the planning process, which she described as follows:

Steve and I would sit down and talk about what he wanted to have happen in general terms, and I’m really impressed as I look back at how organically things developed, and I think that’s partly because Steve was smart enough to trust the process. You know how important collaboration was to him, and he had some real clear notions about the general direction he wanted to go in and about some things he didn’t want to have happening, but [there was also] a lot of open space that was going to get filled in through the process. So he would identify... for me and with me... people that I ought to be talking to about something, and there would be a lot of talking before anything went on paper for any kind of formal consideration.<sup>3</sup>

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<sup>1</sup> Minutes, 1994-1995, 140.

<sup>2</sup> Ibid., 141.

<sup>3</sup> Bremer, interview.

This kind of process hearkened back to Bremer's notion of "feedback loops" and Portch's emphasis on inclusion and collaboration. Between board meetings, Bremer would incorporate the regents' feedback and solicit feedback from the presidents and the system office to write and rewrite the documents that would become the strategic plan.<sup>4</sup> At each stage of the writing of the plan, a draft document would be widely distributed for feedback, which would then be considered for inclusion in the final document. "That draft might be sent at least, well, at least once, usually twice, sometimes three times for feedback," said Bremer, "and my job was to filter out, like a sieve, the things that needed to be in the draft."<sup>5</sup>

On December 14, 1994, in a meeting of the Planning and Oversight Committee as a Committee of the Whole, the Board of Regents ratified its final Guiding Principles for Strategic Action. The document is presented below in its entirety so that the reader may gain full understanding of its breadth and depth:

### **Guiding Principles for Strategic Action**

#### Student Access for Success

The University System of Georgia – which includes the Board of Regents, its Chancellor's Office, and all the institutions governed by the Board –

1. Shall stimulate Georgians' aspirations for higher education, have high academic standards for its students and programs, challenge and assist students to meet or exceed those standards, provide sound academic and career advice, help students prepare for employment and lifelong education in a changing world, and increase the number of well educated Georgians.
2. Shall place the welfare of its students, within the context of academic quality, as its first priority in decision-making at all levels.
3. Shall seek a high-quality, diverse pool of students to admit, insuring that the majority has the preparation considered necessary for college success and providing focused support for those students whom it selectively admits without the standard preparation.

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<sup>4</sup> Ibid.

<sup>5</sup> Ibid.

4. Shall insure that Georgians comprise the large majority of its students, with special emphasis on the representation of minorities among its successful graduates, and shall strategically recruit students from other states and nations so that all may benefit from a diverse student body.
5. Shall reasonably accommodate the needs of non-traditional learners in providing access, services, and instruction.
6. Shall insure that each of its institutions provides an educational, physical, and social environment that supports learning and growth, raises ethical issues for consideration, embraces cultural diversity as a social norm and economic asset, and prepares its students for leadership, collaboration, and conflict resolution in an international, technological, and environmentally responsible society.
7. Shall insure adequate written policies and procedures for dealing with student complaints and discipline, with proper attention both to advocating students' concerns and to holding students responsible for their actions, in order to provide fair treatment of students collectively and individually at the institutional level, with specified grounds for appeal to its Board of Regents.

#### Academic Excellence and Recognition

##### The University System of Georgia

8. Shall promote to Georgians and the nation its commitment to service by supporting strong undergraduate, graduate and professional education; pathbreaking research and creativity; and other national patterns of academic excellence in its curricula and operations.
9. Shall make the best possible freshman-sophomore education available for students at all its institutions, shall ease the transfer of lower-division credits among its institutions, and shall expect all students seeking a baccalaureate degree to undertake and complete a core curriculum at one of its institutions or by transfer from a comparable college or university.
10. Shall use educational technology, innovation, and teaching strategies that produce the most learning by engaging students actively, collaboratively with other students, and in frequent contact with faculty. It shall promote and reward excellence in teaching, and shall maximize the benefit to students and to the state from the research, scholarship, and service activities that complement teaching.
11. Shall make teacher education a high priority, holding all its programs for current as well as prospective teachers to high standards of quality, innovation, and technological advancement.
12. Shall insure that its historically black institutions are models of access to academic excellence, full partners in land-grant and other collaborations, and assets in the entire System's continuing initiatives to eradicate inequities and to increase current opportunities for all Georgians.
13. Shall insure that each of its institutions has a clear, substantive, distinctive mission that supports the mission and vision of the System as a whole; a

commensurate array of academic programs; and adequate resources concentrated to emphasize its distinctive strengths. The University System shall also encourage program collaboration and otherwise minimize unnecessary program duplication among its institutions, particularly in costly programs.

#### Development of Human Resources

The University System of Georgia

14. Shall recruit aggressively and nationally for talented, diverse faculty to serve the various missions of its institutions. It shall also develop and retain faculty in an attractive, collaborative, productive environment for teaching and learning that includes, for both non-tenured and tenured faculty: clear personnel standards and policies; expectations and programs for continued professional growth; resources to support excellence in teaching, scholarship, research, and community service; competitive compensation and other recognition for meritorious performance.
15. Shall recruit and retain nationally respected administrative leaders and well qualified staff, who are diverse in background and committed to students and to the missions of their respective institutions. It shall support them with the resources they need to do their jobs, clear personnel standards and policies, professional development opportunities, and competitive compensation to reward achievement, encourage excellence and teamwork, and insure accountability at all levels.
16. Shall have strong written policies and procedures for selecting personnel, for establishing expectations, for making personnel decisions and handling appeals at the lowest responsible level; shall maximize authority and accountability for its institutions to resolve grievances; and shall specify the grounds for personnel appeals to be referred to its Board of Regents.
17. Shall be pro-active in pursuing equity and in managing risk, thereby maximizing the effective talents of its personnel and minimizing human injury and related legal costs.

#### Efficient Use of Resources

The University System of Georgia

18. Shall have strategic enrollment policies that determine the number of students its various institutions can serve excellently based on its projected resources. It shall forecast changes in student demand and resources, prepare effectively for those changes, market the full range of its campus settings, and make optimal use of all existing human and physical resources, including the access-cornerstone capabilities of its two-year colleges, to advance Georgians' access to academic quality.
19. Shall encourage its institutions of all sizes to be full partners in inter-unit collaboration, shall provide incentives for technological and other innovations, shall maximize economies of scale in configuring its

campuses and academic programs, and shall also use interstate cooperation to meet Georgians' needs for higher education.

20. Shall pay priority attention to regions of the state with unusually underserved populations and/or exceptionally large population growths in managing access to needed academic programs and collaborative delivery of needed educational services.
21. Shall support the responsibility of its individual institutions to monitor and meet local needs, and to take advantage of local opportunities, by initiating collaborations whenever appropriate, by acting on their own when it is consistent with academic quality and mission, and by functioning as effective brokers to bring to bear on local needs the resources of the entire System.
22. Shall base its capital priorities on a Systemwide perspective, strategic and academic program planning, audits of existing and projected physical capacities, and careful analysis to determine the benefits of renovation or new construction as options to meet needs.
23. Shall design and build facilities flexibly to accommodate tomorrow's educational methods and technologies for distance education, and shall balance local initiative and central oversight in their design and construction in order to enhance both campus environments and statewide economic benefits.
24. Shall seek its full share of state revenues to meet a realistic, long-term estimate of its needs; aggressively pursue private gifts in support of quality higher education and public funding at local, state, and national levels; keep tuition reasonable and predictable, with priority consideration for Georgians and undergraduates; and insure that its budgetary policies and practices all support its strategic priorities.

#### System Strength through Governance

##### The University System of Georgia

25. Shall maximize the effectiveness of its Board of Regents in setting policy and priorities, communicating its will on a continuing basis through a well staffed Chancellor's Office, and guiding toward its vision the System's institutions and program operations through the presidents.
26. Shall exercise the Board of Regents' constitutional governance authority over its institutions within the context of constructive, continuous relationships with the General Assembly, the Governor's office, and other state agencies.
27. Shall use the best management practices of continuous strategic planning and quality improvement, suitable standards and rewards, regular assessment reviews, and a focus on learning productivity, all in an atmosphere of cooperation and accountability. It shall thereby insure the implementation of its policies, the effectiveness of its programs and units and administrative leaders, and proper stewardship by its Board of state resources to provide Georgians access to academic excellence.

28. Shall develop reliable, broad-based data and draw on effective advice--including state, regional, and institutional perspectives of administration, faculty, students, community leaders, and other stakeholders--for its policy decisions.

#### Effective External Partnerships

#### The University System of Georgia

29. Shall create deep, rich partnerships with elementary and secondary schools by initiating and supporting collaborative faculty development, dynamic and sustained pre-college programs, and other projects throughout its institutions to assist in insuring that Georgia's children and young people receive strong preparation and advisement for college study and lifelong learning.
30. Shall maintain an interactive, reciprocal partnership with the Department of Technical and Adult Education that includes distinct missions, collaboration and open communication, bridges between the two systems, complementary involvement in school-to-work and other programs, and the recruitment of students to whichever post-secondary program best serves each individual's immediate educational needs.
31. Shall maintain and expand contacts with business and government leaders and organizations to assist them in accomplishing their goals in an increasingly international environment, to insure that its own non-credit and degree programs are current and flexible, to provide students with opportunities for involvement with business and government, and to bring System resources fully to bear on the state's economic development.
32. Shall maintain both direct and technological linkages with major cultural and social organizations and governmental agencies, encourage joint projects with them, maximize their access to its continuing education and support resources, seek their assistance to develop curricular, research, and service projects and student opportunities, and work collaboratively to advance and enrich the quality of life for all Georgians.
33. Shall pursue coordinated approaches to statewide, national, and international telecommunications and other technological initiatives that maximize public access to information, benefit public health and material well-being, and improve educational access, quality, and cost-efficiency.
34. Shall promote the highest possible public opinion of its impact on the lives of all Georgians by interpreting its needs, activities, and accomplishments with sustained effectiveness to the general public and to business, community, and political leaders at both state and local levels, and by engaging Georgians in strong support for quality public higher education.<sup>6</sup>

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<sup>6</sup> Minutes, 1994-1995, 168.

The Board of Regents would use these broadly sweeping principles as a framework for their future policy decisions. The adoption of the principles marked the conclusion of the first phase of the strategic planning process and set the stage for the second phase consisting of the very rapid development and adoption of a succession of policy directives growing out of the principles, which I will discuss in Chapter 4.

### Money Matters

In January 1995, Chancellor Portch presented his first budget proposal for the University System of Georgia to the General Assembly. At its December meeting, the board had approved its first three policy directives, one of which was the FY 1996 Strategic Allocation Policy Directive.<sup>7</sup> Linked to principles 8, 19, 21, and 24, the goals of this policy directive were “to use strategic priorities as well as the enrollment formula in allocating budgetary resources, starting with FY 1996” and “to use FY 1996 allocations to encourage inter-institutional collaboration and to enhance national patterns of academic excellence (including at the historically black institutions as assets).”<sup>8</sup> This policy directive tied the budgetary process to the strategic planning process and set the tone for the chancellor’s budget presentation.

Approved by the Board of Regents in September 1994, the \$1.4 billion budget proposal included a 6% pay raise for faculty and staff and three special funding initiatives totaling \$45 million to support programs of collaboration and national preeminence, \$39

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<sup>7</sup> Ibid.

<sup>8</sup> FY 1996 Strategic Allocations Policy Directive, Adopted by the Board of Regents, Dec. 14, 1994. (A copy of this document is in the author’s possession.)

million specifically in the area of technology.<sup>9</sup> Although special funding initiatives had been used by former Chancellor Propst, Chancellor Portch used them to a much greater extent because Governor Miller had been very clear that while he wanted to restore the budget for the University System of Georgia after many years of significant decreases during the previous economic downturn, he wanted any increases to be tied to specific strategic initiatives rather than applied to the general formula.<sup>10</sup> Moreover, the strategic funding initiatives focused on systemwide programs. “The special initiatives are aimed at students,” Portch is quoted as saying in *Atlanta Business Chronicle*. “It’s not for any particular campus or institution. It’s to bring equity for all our students.”<sup>11</sup> At least two of the budget requests came as direct results of meetings between the chancellor and the governor about such targeted enhancements.

The request for a 6% pay raise for faculty and staff may have developed out of Portch’s first meeting as chancellor with Governor Miller, a meeting which took place at the home of the new president of the Georgia Institute of Technology, G. Wayne Clough, and included all four research university presidents. Portch recalled that he and the presidents had talked prior to the meeting with Governor Miller so that when the governor asked them to identify the one thing he could do that would have the most effect on moving the system toward national preeminence, they were in consensus with Portch’s response, “If you’ll commit to four successive years of 6% salary increases, we can use that to recruit some terrific faculty talent. A university is all about the talent of its faculty, and if we want to [improve quality], we have to really compete for the very best

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<sup>9</sup> Minutes, 1994-1995, 51. Gail Hagans, “Portch Seeks Pay Hikes for University Faculty,” *The Atlanta Journal-Constitution* (September 14, 1994), C10.

<sup>10</sup> Portch, first interview.

<sup>11</sup> Julie B. Hairston, “University Chief Studying How to Manage Growth,” *Atlanta Business Chronicle* (June 7, 1996), 3B.



talent. [We told the Governor,] if you'll do that, we believe we can bring the talent

here.”<sup>12</sup> President Clough's recollection of the meeting was consistent with Portch's:

I don't think I've ever heard a governor say faculty are an investment in the future. I think they talk about the costs and [that] faculty are paid too much... but Governor Miller saw education, and higher education in particular, as a key to the economic growth of Georgia, and he saw it in a very broad way, which is important.... He said, "What is the most important thing I can do for the next four years to make these universities much more competitive with the best universities?" And I've never had that question asked of me before or since, and so we all looked at each other and said, "Faculty salaries," because they were low at the time. And he committed to getting Georgia to the top of the Southeastern region, and so, it was 6% salaries for four years, and we convinced him the staff had to go along with it.... The fact that he stuck with that and the fact that Steve Portch was consistent in maintaining that that was desirable [were] very important. That was leadership, and it made a difference, and it's making a difference today. That's the amazing thing about it.<sup>13</sup>

However, Governor Miller's recollection of the meeting was somewhat different. He recounted:

Well the meeting didn't lead to the 6% salary increase. I knew increasing teacher and faculty salaries by that amount over my second term was to be my top priority. We well understood that we had slipped and that we needed to provide more money but also send a strong signal that faculty mattered to us – that counts as much as money sometimes, letting them know that you value what they do and that we want the best in our state. I made this decision separate from that meeting.<sup>14</sup>

Regardless of how and when the decision was made, the fact remains that 6% salary increases for university system faculty and staff were requested and approved for four consecutive years under Governor Miller. From fiscal year 1995 to fiscal year 1999, the merit based salaries of all University System of Georgia faculty rose by 29%, which ultimately elevated the system to third place in the Southern Regional Education Board

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<sup>12</sup> Portch, first interview.

<sup>13</sup> G. Wayne Clough, interview by author, Atlanta, GA, July 24, 2007.

<sup>14</sup> Miller, letter.

(SREB) states in average faculty salaries, positioning the system to attract and retain better faculty members.<sup>15</sup>

Another key element of Portch's first budget request was \$10 million to launch Georgia Library Learning Online (GALILEO). Portch recalled discussing this proposal with Governor Miller at their second meeting. The proposal would bring various electronic materials of the system libraries into a shared network, provide a simple and commonly distributed means of retrieving these materials online, and significantly improve interlibrary loan coordination in the system.<sup>16</sup> It would also present opportunities for cost sharing: "Instead of having 34 libraries all struggling to have the same chemistry abstracts, we can purchase one full set of abstracts and make them available electronically to every student in the system," Portch is quoted as saying.<sup>17</sup>

"I wanted a project very, very early on which would symbolize everything that I wanted us to stand for, [such as collaboration,] use of technology, and serving the state," explained Portch. "Other states were experimenting with a single electronic library for

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<sup>15</sup> Eby-Ebersol, 103. Note, Ebersol claims that the four years of 6% salary increases under Miller's second term were able to elevate the system to second place in the SREB states and had positioned it to rank first in 1999. However, I was unable to find any data that supports the claim that the system ranked second with regard to faculty salaries in the SREB at any time during the Portch administration. After exhaustive searching on the SREB web site, I sent an email inquiry to them. An email response I received on July 23, 2008, from Joseph L. Marks, Director of Educational Data Services at SREB, indicated that four-year faculty salaries in the system were at their most competitive during the Portch administration when they rose to third place in the SREB states in 1997-1998. (They had in fact been at second place in 1981-1982 but did not reach that level during the Portch administration.) Moreover, a recent study reported "that the average faculty salaries at the majority of public institutions in Georgia are currently below the median salary levels for peer institutions, and almost every public institution in Georgia is well below the 75<sup>th</sup> percentile of the range of average faculty salaries for their peers. The data also illustrate that between 1991 and 2006, the faculty salaries in Georgia have become less competitive in the majority of public institutions. This reduction occurred despite substantial progress that was made in raising faculty salaries in Georgia during the late 1990s." See Robert K. Toutkoushian and John Milam, "The Competitiveness and Compression of Faculty Salaries in Georgia's Public Institutions," Submitted to Representative Bob Smith, Chair, HR 1082 – House Higher Education Finance and Formula Study Committee, Georgia House of Representatives, December 10, 2007. This document is on file with the Office of External Affairs, University System Office. A copy of this document is in the author's possession.

<sup>16</sup> Minutes, 1994- 1995, 222.

<sup>17</sup> Reagan Walker, "Pooling College Resources: Libraries Request Statewide On-Line System for Schools," *The Atlanta Journal-Constitution* (December 27, 1994), B4.

their universities. No other state was crazy enough to say they would do it for the whole state, for public libraries, school libraries, DTAE libraries, and even the private institution libraries. And that idea was hatched very early on.”<sup>18</sup> In fact, the concept for GALILEO had been discussed at the regents’ August 1994 strategic planning retreat.<sup>19</sup>

Moreover, this was one area in which the system was already demonstrating collaboration amongst institutions. Portch appointed Dr. Richard Skinner, who at the time was the new president of Clayton State College, as chair of the steering committee to develop and implement GALILEO.<sup>20</sup> He recalled that Portch recognized that there was already a long-standing network of close cooperation of librarians who had worked out all sort of arrangements among themselves and that this existing collaboration presented an opportunity.<sup>21</sup> According to former Chief Information Officer Randall Thursby, system librarians had already been exploring ways to provide collaborative services and a common library system, and Georgia State University (GSU) was already hosting the PAL system on a mainframe for 13-14 institutions around the state.<sup>22</sup> GSU’s library system provided access to the lists of holdings of more than 40 public and private institutions around the state.<sup>23</sup> Meanwhile, the University of Georgia and the Georgia Institute of Technology had their own automated systems, while some two-year colleges were still on the card catalog system.<sup>24</sup>

GALILEO was modeled after the system at GSU, which had been developed by Dr. Bill Potter, Director of Libraries for the University of Georgia, and Dr. Ralph Russell,

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<sup>18</sup> Portch, first interview.

<sup>19</sup> Minutes, 1994-1995, 225.

<sup>20</sup> Ibid.

<sup>21</sup> Richard A. Skinner, interview by author, telephone, July 25-26, 2007.

<sup>22</sup> Randall A. Thursby, interview by author, telephone, September 26, 2007.

<sup>23</sup> Walker, December 27, 1994.

<sup>24</sup> Thursby, interview.

University Librarian at GSU.<sup>25</sup> Russell is credited with naming the program.<sup>26</sup> As would become the hallmark of the Portch administration, collaboration and expediency were key in the implementation of GALILEO. The steering committee responsible for planning and implementing the project included presidents from four system institutions (Clayton State College, Gainesville College, Middle Georgia College, and Valdosta State University), librarians from five institutions (Columbus College, Georgia State University, University of Georgia, Valdosta State University, and West Georgia College), a technologist from Georgia Southern University, and one system office staff member.<sup>27</sup> The proposal to the Governor was drafted in one weekend, and once the budget request was funded by the legislature, GALILEO became operational within 150 days.<sup>28</sup> Skinner noted, “Without [Portch’s] determination on that, I don’t think we ever would have gotten there... because at the same time we were talking about getting the journals and all, getting GALILEO up, the librarians were also asking for money for new library automation systems, but they needed five different systems. [We] negotiated them down to one.”<sup>29</sup> Portch understood that both the salary increases and GALILEO would receive enthusiastic institutional, public, and media support and would draw nationwide attention to the changes occurring in the University System of Georgia.<sup>30</sup> President Dorothy Lord of Coastal Georgia Community College remarked, “The concept of a statewide library was quite striking for that period, and having the vision to make it happen and getting the

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<sup>25</sup> Ibid.

<sup>26</sup> Minutes, 1995-1996, 222.

<sup>27</sup> Ibid.

<sup>28</sup> Ibid, 223.

<sup>29</sup> Skinner, interview.

<sup>30</sup> Portch, interview; Minutes, 1995-1996, 222.

resources, that was revolutionary to get that much money to put into something like a statewide library.”<sup>31</sup>

By the time Portch came before the Joint Appropriations Committee in January 1995, the Georgia General Assembly was well aware of the Board’s new strategic plan. Not only had there been a great deal of media coverage, as well as speeches, presentations, and meetings with a wide range of statewide constituents, but Portch himself had already sent the legislators two strategic planning memoranda by this time. The first memorandum was sent on September 14, 1994, following the board meeting in which the Committee on Planning and Oversight fine-tuned the Vision Statement, a copy of which was sent with the memorandum. He explained in his memorandum, “Our goal is to serve the people of Georgia by taking the System to the next level of collaboration, avoiding duplication and reducing competition.”<sup>32</sup> He also invited them to respond to his memorandum by writing, “I trust that you will get back to me if you have any pressing concerns as we proceed, since we need you to join the consensus we are building.”<sup>33</sup>

Portch sent the second memorandum, along with a copy of the board’s Guiding Principles for Strategic Action, immediately following their adoption at the December board meeting. In this memorandum, he explained, “Our guiding principles support all the elements in our vision statement, and give us guidance on every one of the issues that we have identified as needing to be addressed by our strategic planning process.”<sup>34</sup> Again he stressed, “On every possible front, we are working to take the System to the next level

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<sup>31</sup> Dorothy L. Lord, interview by author, Brunswick, GA, August 15, 2007.

<sup>32</sup> Strategic Planning Memorandum from Chancellor Stephen R. Portch to Members, Georgia General Assembly, September 14, 1994. (This document is from the personal files of Sidney Bremer. A copy of this document is in the author’s possession.)

<sup>33</sup> Ibid.

<sup>34</sup> Strategic Planning Memorandum 2 from Chancellor Stephen R. Portch to Members, Georgia General Assembly, December 14, 1994. (This document is from the personal files of Sidney Bremer. A copy of this document is in the author’s possession.)

of collaboration, avoiding duplication and reducing competition,” and again, he invited the legislators to respond by writing, “Do call if you have any questions.”<sup>35</sup>

Portch began his formal budget presentation to the Joint Appropriations Meeting by saying, “It’s all about money.”<sup>36</sup> The centerpiece of the budget presentation was a video by Georgia Institute of Technology faculty and students.<sup>37</sup> Bremer explained that the students were involved in the presentation “because another part of what Steve knew was to get the students out there, make sure that people are constantly reminded that that’s what this is all about. It’s not about their own egos or whether their own institutions are leading institutions. It’s about whether our students are being served, and so he would have students do things, and he would have students make that presentation.”<sup>38</sup>

The video explained the budget formula and special initiative requests. It also depicted a map of the United States indicating which states were in competition for faculty members and how salary increases would help to attract them to the University System of Georgia.<sup>39</sup> The video and the budget presentation as a whole focused on the strategic plan and guiding principles and carefully tied the budget request to the plan. The presentation included considerable data to back up the budget requests. “Steve made clear that not only was there going to be a traceable process, but that we were going to be data-based.”<sup>40</sup> The presentation received a round of applause, and the chancellor was asked

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<sup>35</sup> Ibid.

<sup>36</sup> Reagan Walker, “Chancellor Proposes Budget of \$1 Billion: Lawmaker Praises Portch for Vision,” *The Atlanta-Journal Constitution* (January 18, 1995), C1.

<sup>37</sup> Bremer, interview.

<sup>38</sup> Ibid.

<sup>39</sup> Ibid.

<sup>40</sup> Ibid.

very few questions.<sup>41</sup> The Vice Chancellor for External Affairs, Tom Daniel, shone some light on why so few questions were asked of the chancellor:

There was more of a house-keeping seal of approval in the state about some of the things that were happening. As it related to across the street, I think many of the members of the General Assembly were taking their cues from the Governor, from the citizenry that there was a lot of potential, the groundwork had been laid, they were ready for things to happen.... There was also a lot of hope that the Chancellor was going to be able to take advantage of a lot of these opportunities and he really did.<sup>42</sup>

Bremer recounted that the presentation was very well received:

I remember coming back from that and really celebrating that we had gotten very positive response from the legislature, from the joint committee. And I think that was where we really had the sense of payoff for the first time, quite literally payoff, that we were going to get all... if it wasn't all the positive recommendations that we wanted, almost all of them, that we had made our case and they had heard it as a case, and as a legitimate case, and that they were applauding the progress [that] had been made. And I think all the way along, that was real important. Progress had to be made in order for people to believe progress would be made. In order for them to see that if you give the university the right to do such and such, they'll do it and they'll do a good job of it. So, that was really a good feeling.<sup>43</sup>

At least one legislator publicly applauded Portch's budget proposal. "It's about vision, about a plan for the future," State Senator Sonny Perdue (D-Bonaire) was quoted as saying in *The Atlanta Journal-Constitution*.<sup>44</sup> "There's a lot of money in the budget for higher education. That just wouldn't happen without a plan," he said.<sup>45</sup> He also lauded the chancellor "for bringing new energy and direction" to the University System of Georgia.<sup>46</sup> President Carl V. Patton of Georgia State University was also quoted in the article as saying, "He's done so much so quickly.... He's a thinker and a leader and

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<sup>41</sup> Bremer, interview; Letter from Sidney H. Bremer to Regent Elsie P. Hand, January 17, 1995. (This document is from the personal files of Sidney Bremer. A copy of this document is in the author's possession.)

<sup>42</sup> Daniel, interview.

<sup>43</sup> Bremer, interview.

<sup>44</sup> Walker, January 18, 1995. (Sonny Perdue was elected Governor of the State of Georgia in 2002.)

<sup>45</sup> Ibid.

<sup>46</sup> Ibid.

there's really a high level of excitement.”<sup>47</sup> In the final analysis, the budget request was fully funded.

### Setting the Compass

Between December 1994 and July 1995, the Board adopted 12 policy directions which grew directly out of the guiding principles, the majority of which were crafted by Bremer. As with the development of the vision statement and guiding principles, Bremer was extremely careful with writing and presenting the policy directives. She explained:

When those drafts went to the regents they got used to the format so they knew where to find things.... They knew what to expect, and... obviously, we always tied back to the vision and the guiding principles. So everything we did during the year we tied back to it to make sure that people understood that this was not just going to go up on a bookshelf somewhere and never be referred to again, that it was being actively referred to all along.<sup>48</sup>

As with the vision statement and guiding principles, the process of “feedback loops” was critical to fostering a sense of ownership and engagement. The draft policy directives were first vetted by the regents and then sent to the presidents in advance of board meetings, allowing both parties the opportunity to respond to any concerns that might arise. President Dorothy Lord of Coastal Georgia Community College recalled, “And he would send everything out, and he would ask for your honest input, and then when you gave it, it was actually considered! That’s what made it work, because it had buy-in from the ground-up.”<sup>49</sup> While they were given an opportunity to participate in the development process, the pace remained steady, and usually, they were expect to respond within 30

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<sup>47</sup> Ibid.

<sup>48</sup> Bremer, interview.

<sup>49</sup> Lord, interview.



days. Meanwhile, Bremer was responsible for ensuring that all of the regents were on board every step of the way. Former Secretary to the Board Gail Weber said, “He used Sid to follow up with every regent.... I know she had to have been up all night some nights.”<sup>50</sup> After the regents and presidents had contributed the feedback, Bremer would fine-tune the documents and return them to the board for formal consideration. “None of that took more than a couple of months for each one,” said Weber, “And it was heavy, revolutionary stuff.”<sup>51</sup>

The chancellor kept things moving forward by consistently and clearly communicating where the process was, where it had been, and where it was going. He was fond of borrowing the famous Wayne Gretzky quote, “I skate to where the puck is going to be, not to where it has been.”<sup>52</sup> At board meetings, he would announce what policy directives were on the horizon, and between board meetings, he inundated fax machines at the regents’ and presidents’ offices sending drafts for their review and response.<sup>53</sup> While he set the general direction and tone of the planning process, Portch remained flexible in the creation of the product along the way. Bremer explained, “Steve remained so open to very specific things that would change as you went along. It wasn’t that the original idea was rejected, and you ended up with something different; it was an evolutionary process as language would get feedback.”<sup>54</sup> The most apparent example where language was changed was in the titles of the policy documents themselves. “We started out calling them ‘directives,’” recounted Weber, “and then, after we got some pushback from the campuses that this was too dictatorial... it was changed to

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<sup>50</sup> Weber, interview.

<sup>51</sup> Ibid.

<sup>52</sup> Bremer, interview; Daniel, interview; Portch, interview; Weber, interview.

<sup>53</sup> Bremer, interview; Portch, interview; Weber, interview.

<sup>54</sup> Bremer, interview.

‘directions.’”<sup>55</sup> When asked about this modification, Bremer explained, “The writing was not inconsequential. You know, choosing this word rather than that word mattered.”<sup>56</sup>

The third phase of the strategic plan, implementation, commenced while the second phase of development was still underway. As policy directives were being adopted, the net of collaboration was cast even wider. The regents, presidents, and system office had been the key participants in the development of the vision statement and guiding principles. Portch recognized the broader expertise and acceptance that would be necessary as the actual policy directives were put into action; therefore, most of the directives had their own systemwide taskforces.<sup>57</sup> In all, over 300 faculty, staff, and student leaders were involved in implementation taskforces that were directed to make recommendations on specified issues to the chancellor for him to take forward to the board.<sup>58</sup> Bremer stated that “[Portch] really took care with consultations so people would feel that they had had some input, that the package didn’t just come out of the blue, ignoring all of the work that had been done before.”<sup>59</sup>

The June 1995 board meeting represented a significant month in the advancement of the strategic plan. At that meeting, the Board of Regents adopted its Policy Direction on Admissions, perhaps the most important of all the directives, one which I will examine in the next chapter. The June meeting was also the last board meeting for Dr. Bremer in her contract term as Special Assistant to the Chancellor. In the course of less than one year, she had crafted an epic strategic plan, and she would leave the regents and

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<sup>55</sup> Weber, interview.

<sup>56</sup> Bremer, interview.

<sup>57</sup> An exception was the mission review piece, which was delegated to outside consultants to lend more validity and objectivity to the process.

<sup>58</sup> Sidney H. Bremer, *Along the Journey Toward... Access to Academic Excellence for the New Millennium: A Strategic Planning Progress Report* (Atlanta, Board of Regents of the University System of Georgia: June 1995), 7.

<sup>59</sup> Bremer, interview.

chancellor with a volume of documents that contained their policy directives as well as the implementation teams and timelines for those directives. “I look back on this year now with such a sense of accomplishment and pleasure about it because, in fact, we did a lot and we accomplished a lot,” she said.<sup>60</sup>

June also heralded the arrival of the board’s first official strategic planning progress report, which was written by Bremer and edited by the new Assistant Vice Chancellor for Media and Publications, Arlethia Perry-Johnson. The report was presented at the board meeting and served as a capstone to the first year of the strategic planning process. Titled “Along the Journey Toward... Access to Academic Excellence for the New Millennium,” the report employed the metaphor of a journey to characterize the strategic planning process. As Bremer recounted, “Steve began to understand and say that the vision [statement] was our El Dorado. It was what we were aiming at, and even though we might not get there, we were going to head in that direction, and that the guiding principles became then our compass headings to get us there.”<sup>61</sup> In fact, the cover of the report depicted a picture of a compass with the Board of Regents seal as its center. Inside the document was a letter from the Chair of the Board, Donald M. Leebern, Jr., and the Chair of the Committee on Planning and Oversight, Thomas F. Allgood, Sr., that carried the theme along: “Determined that Georgia’s educational ship must progress still more dramatically, the Board of Regents and our newly appointed Chancellor Stephen R. Portch, have decided that it is time to reset our compass.”<sup>62</sup> Portch also used this theme in a letter to Governor Miller:

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<sup>60</sup> Ibid.

<sup>61</sup> Ibid.

<sup>62</sup> Bremer, 3.

As this report's ruling metaphor suggests, I've often thought of our strategic planning effort as a voyage on the seas of change in higher education. Our vision is the El Dorado we steer for; our guiding principles are the compass headings; and the Regents' policy directions have pointed us toward the specific routes we'll need to develop and travel together. I think that makes you our Neptune! You've done much to bear us up with strong waves of state resources and currents of public support. **I can't thank you enough.**<sup>63</sup>

The report highlighted the three phases of the strategic planning process and summarized where the various policy directives were in that process. It showcased positive public and media support for the plan and presented a timetable for implementation. "The Regents are determined to accelerate the University System toward national preeminence, not for the purposes of status but because Georgians deserve a world-class education," the report proclaimed. "All the Board's guiding principles and initiatives aim toward that end."<sup>64</sup>

In his remarks to the board at the June meeting, Chancellor Portch publicly thanked Bremer for her contribution crediting her for "a legacy of planning in the form of a manual of policy directives, the implementation task force memberships and a timetable for next year."<sup>65</sup> He then introduced Dr. Sharon James as his new Special Assistant, noting her skills in planning and implementation.<sup>66</sup> Bremer reflected on the transition:

I was also glad that I didn't have to do all of it, that in June I could walk away from it and my part of the project had gotten closure. That was the gift of the compass report, the progress report at the end, and even this binder [of the policy directives and implementation plans]. I mean, just the heft of that huge binder, of all the stuff that we had put together during the year, gave me a very kinesthetic sense of having achieved a lot. By that time, I knew that that stuff wasn't just going on the shelf because it was already in the works.<sup>67</sup>

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<sup>63</sup> Letter to Governor Zell Miller from Chancellor Stephen R. Portch dated June 24, 1995. (This original document is in the Chancellor's Office files in storage at the University System Office in a folder labeled "Governor Miller." A copy of this document is in the author's possession.)

<sup>64</sup> Bremer, 13.

<sup>65</sup> Minutes, 1994-1995, 328.

<sup>66</sup> Ibid.

<sup>67</sup> Bremer, interview.

Indeed, the strategic plan had set sail on its way to implementation, and James would take the helm from Bremer for the next leg of the journey. Simultaneously, the board leadership would change as the chairmanship of the board transferred from Regent Leebern to Regent Juanita Powell Baranco, a highly respected lawyer, business person, and civic leader, and now the first African-American woman to chair the board.

## CHAPTER FIVE: SETTING SAIL

Fiscal year 1996 would be as frenetic as Portch's first year in office. In fact, these first two years would be characterized as a "cyclone of activity" by *The Chronicle of Higher Education*.<sup>1</sup> In the course of eight months, the board had approved 12 policy documents that constituted the second phase of the planning process and set the stage for the third phase, implementation. In July 1995, Dr. Sharon James came from the UW system to follow in Bremer's footsteps as Chancellor Portch's special assistant. "Sid [Bremer] and then Sharon [James] were exactly the right people at the right moment for their particular roles," said Portch. "Sid was so brilliant at synthesis, at capturing ideas [and putting them] into words. Sharon was really very organized and really good with people. So, with all of those implementation committees, she could get away with murder with tight deadlines and so on."<sup>2</sup> It would be James' primary responsibility to work with systemwide taskforces to implement the board's policy directives, which were as follows:

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<sup>1</sup> Kit Lively. "Georgia's Hard-Charging Chancellor Enjoys a Long Honeymoon," *The Chronicle of Higher Education* (November 17, 1995), A26.

<sup>2</sup> Portch, first interview.

<b>Policy Directive</b>	<b>Related Principles</b>	<b>Date Approved</b>
Partnership with the Department of Technical and Adult Education	30	December 14, 1994
Mission Development and Review Policy Directive	8, 12, 13, 20, 27	December 14, 1994
FY 1996 Strategic Allocation	8, 12, 13, 19, 24	December 14, 1994
Early-Semester Calendar Policy Directive	1, 8, 10, 19	February 8, 1995
Faculty/Staff Development Policy Directive	10, 14, 15, 16	March 8, 1995
Policy Directive on Internationalizing Education: Access to Academic Excellence for World-Class Institutions	1, 4, 6, 8, 10, 13, 14, 19, 31, 32, 33	March 8, 1995
Pre-School-College (P16) Policy Directive	1, 4, 8, 11, 29	March 8, 1995
Tuition Policy Direction	4, 5, 8, 18, 24	April 12, 1995
Policy Direction for Capital Priorities and Master Plans	6, 19, 22, 23, 24	May 10, 1995
Policy Direction on Admissions	1, 2, 3, 4, 5, 29	June 14, 1995
Policy Direction on Honorary Degrees	1, 6, 8, 34	June 14, 1995
Policy Direction on Hiring Procedures		July 14, 1995
Policy Direction on Conflict Resolution		July 1995

By the time James arrived, Portch had already appointed many of the implementation taskforces and instructed them on his expectations. The taskforces generally consisted of campus representatives from across the various types of system institutions – administrators, faculty and staff members, and sometimes students – who would be characteristic of their type of institution and the campus-level constituents most affected by the particular policy directive. The point of the taskforce model was to reinforce the chancellor’s theme of systemwide collaboration, but just as importantly, it was intended to foster engagement at the campus level. “He tried as much as possible to be collaborative in consensus building by using the taskforce model,” said Associate Vice Chancellor for Media and Publications Perry-Johnson. “It allowed the ideas to bubble up

rather than to be top-down driven... but basically it gave the institutions that had ambition and talent the opportunity to rise to the occasion.”<sup>3</sup>

Sharon James met with the taskforces, but she worked closest with the taskforce chairs. Each systemwide taskforce would meet a number of times, hammer out its collective ideas and recommendations, and draft a report. Then, James would meet with the taskforce chair (or co-chairs) to review the report and figure out how to transform the recommendations into realistic implementation strategies that the board would embrace. “I figured it was not my job to work with the members of the committee,” she said. “It was my job to work with the people who were selected to chair the committee, and then, their job was to work with the members of the committee per se. So if you can get the chairs to buy in, then it is their job to sell it to the committee. I don’t think we had any dissenting reports.”<sup>4</sup>

Just as Sid Bremer had combined the ideas and aspirations of others into the vision statement and guiding principles, Sharon James would take the taskforce reports and rework them into implementation reports for board consideration. Also like Bremer, James identified an organic quality in the process:

I think in that way there is an organic quality to it. You don’t start off knowing exactly where it’s going to take you until you get to the end. You have an idea, and you don’t want to get too far off the path, but there are going to be things that are going to come up that you are going to have to try to figure out, and whether or not you write those things down, they still need to be in the back of your mind.... As I began to write implementation papers and think about what we were doing and what the committees had said, it wasn’t straightforward. It was a process of figuring out what’s doable, what’s politically doable, what’s doable period. You know, what’s feasible? So there was this process of sifting and winnowing, and it felt organic to me. It felt like I was growing something, and I couldn’t quite be sure what the end product was going to be until I got there, and then obviously, that’s not an end product. That’s an intermediate place in the

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<sup>3</sup> Arlethia Perry-Johnson, interview by author, Atlanta, GA, May 31, 2007.

<sup>4</sup> Sharon James, interview by author, Madison, WI, June 27, 2007.



[process]. The end product is going to be what the campuses actually do with those implementation statements and goals and action items. And there is always room to take an action item and make it into something nobody ever intended for it to be. So I don't know what the end product actually looks like, and it probably still continues to be organic.<sup>5</sup>

After she had crafted a draft implementation report, James would disseminate it to the regents and presidents for their review and input. She then would work their feedback into the report. Afterward, there would be a first reading at a board meeting, a public discussion of the implications and issues, and it would generally sit “on the table” for at least one month, maybe longer if it was particularly complicated.

Whether a final implementation report was exactly what the taskforce had intended is unclear. “There was a real attempt to get buy-in from campuses,” noted James. “The extent to which that actually happened, I would have a very difficult time assessing.... I would have to say that the reports which I wrote had general buy-in and certainly from the chairs and the implementation committee,” she explained, “but they were really Steve’s babies.”<sup>6</sup> As with the development of the vision statement and the guiding principles, Portch was masterful at discreetly ensuring that implementation would go in the direction he wanted. “There were some things that he wanted in. It wasn’t that he wouldn’t listen or that he wouldn’t make adjustments or modifications, because he would do that,” explained James. “So he’s not inflexible, but I think there were some principles that he wanted to be sure got in there. There were some aspects that were a whole lot more important than others.” Portch was concerned not only with how the policy directives would be implemented, but also when. Vice Chancellor for External Affairs Tom Daniel remarked, “The Chancellor was very wise in setting some of those

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<sup>5</sup> Ibid.

<sup>6</sup> Ibid.

things up at a staggered basis that they were not all expected to mature at the same time.”<sup>7</sup>

It is critical to note that the various strategic policies were intricately intertwined. While some policy directives were perhaps reactionary and somewhat operational in nature, they were intended to facilitate the more innovative directives, which were to elevate the system to the national preeminence to which the board and governor aspired. The plan was intended to be holistic and integral. Any one of the directives could be critiqued as a stand-alone strategic initiative, and each one has its own history and tale to tell, but none of them alone would have had the same impact as all of them had together. The policy directives were themselves “a whole that was greater than the sum of its parts.” For the sake of this dissertation, I will focus on four policy directives that together had the broadest impact on the University System of Georgia and helped it rise to national recognition.

### *Mission Development and Review Policy Directive*

One of the first three policy directives adopted at the December 1994 board meeting was the Mission Development and Review Policy Directive, which allowed for a comprehensive evaluation of all 34 system institutions in an effort to enable more effective management of system resources to meet state needs.<sup>8</sup> Tied to guiding principles 8, 13, and 20, the goals of this directive were outlined as follows:

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<sup>7</sup> Daniel, interview.

<sup>8</sup> Minutes, 1994-1995, 168.

To have core mission statements for each institutional type, articulated in language that corresponds to the national terminology of the Carnegie System, by January 1995.

To have a coordinated set of unit mission statements that focus the distinctive strengths and the responsibilities of all University System units and of the System as a whole, by August 1995.

To identify regions with major unmet need for University System services, by January 1995; and to determine, within the context of the Systemwide mission review, the appropriate institutional response to their needs, by August 1995.<sup>9</sup>

In our first interview, Portch indicated that he did not feel this was among the most important of the policy directives, but it was perhaps a necessary evil. “I wanted to settle that down more than anything else. So I think that’s probably more than anything else why it was one of the early initiatives,” he said. “I wanted to settle that down so that people would stop their, in some cases, almost obsessive fixation on ‘change of status’ .... [It seemed there were] all these people waking up in the morning thinking, ‘How can we change our status?’ Everything in that phrase is wrong to me.”<sup>10</sup>

Portch reiterated in his interview a sentiment he had expressed in *The Chronicle of Higher Education* over a decade before, “We don’t have the long-term resources to spread our programs so thin. First I banned the words ‘change of status,’ because a superb two-year college is of much higher status in my book than a mediocre four-year college. A fine, comprehensive regional college is far better than a mediocre, quasi-research university with a couple of flimsy Ph.D. programs.”<sup>11</sup> His reasoning was, as the strategic plan dictated, that the system should operate as “a whole that is greater than the sum of its parts.” It was not economical or wise to have all of the system institutions

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<sup>9</sup> Mission Development and Review Policy Directive, Adopted by the Board of Regents, Dec. 14, 1994. (A copy of this document is in the author’s possession.)

<sup>10</sup> Portch, first interview.

<sup>11</sup> Lively, A26.

moving up in status. Valdosta State and Georgia Southern Universities had been named “regional universities” under the previous chancellor, a sector that was outside of the national norm of nomenclature, and many other institutions were vying for an increase in status, a process known as “mission creep.” Vice Chancellor for Planning and Policy Analysis Cathie Mayes Hudson stated, “At the time, we had requests in from around seven state colleges to be regional universities. We had proposals from more than half of the two-year colleges to move up to the next level.”<sup>12</sup> James noted, “Everybody wants what they don’t have.... There was a need to establish that all of these institutions were part of the system.”<sup>13</sup>

Previously, institutions had brought their missions forward individually for board approval as part of their routine accreditation requirements. Moreover, institutions had been focused on geographic service areas that created institutional turf wars. Portch wanted the institutions to identify their unique existing strengths and focus on developing those strengths rather than focusing on what they aspired to be or their geography. Institutions were given approximately six months to engage in broad consultations with their faculties, staffs, students, and communities and develop a brief (200-500 word) mission statement of their primary responsibilities as well as a short report on how the proposed mission supported the institution’s existing strengths, complemented the strengths of other system institutions, and addressed the workforce needs of the state. In other words, what was distinctive about an institution and what was its special role in the system as a whole?

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<sup>12</sup> Cathie Mayes Hudson, interview by author, Atlanta, GA, May 23, 2007.

<sup>13</sup> James, interview.

The policy directive instructed the chancellor's office to contract a panel of outside consultants to make the mission review process more objective. "We didn't use a lot of external people," Portch said, "but in that instance, we wanted to add a little validity to the process."<sup>14</sup> Dr. Bruce Johnstone, Chancellor Emeritus of the State University of New York, chaired the "Blue Ribbon Panel."<sup>15</sup> In addition to external consultants, the chancellor appointed a team of system office staff members to coordinate the initiative and assist the consultants and presidents in the process. Headed by Interim Senior Vice Chancellor for Academic Affairs Joan M. Elifson, the team developed institutional mission development guidelines outlining the components and content for the proposed mission statements. They also accompanied the consultants in their visits to institutions around the state. Associate Vice Chancellor for Planning and Policy Analysis Cathie Mayes Hudson was one of the staff members on this team. "That was actually one of the most exciting and interesting initiatives in my time here," she said. "It was really long-range planning with a system focus but trying to be completely cognizant of and supportive of each institution's mission."<sup>16</sup> Portch also appointed a five-member advisory committee of external consultants to study and make recommendations on institutional nomenclature and identity. Two member of the committee were also members of the Blue Ribbon Committee. One of them, Dr. Paul Hardin, former Chancellor of the University of North Carolina, Chapel Hill, chaired the nomenclature advisory committee.<sup>17</sup> The charge

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<sup>14</sup> Portch, first interview.

<sup>15</sup> Minutes of the Meetings of the Board of Regents of the University System of Georgia, 1995-1996, 131 (hereafter cited as Minutes, 1995-1996).

<sup>16</sup> Hudson, interview.

<sup>17</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia, June 11 and 12, 1996, <http://www.usg.edu/regents/minutes/1996/june96.phtml> (accessed May 21, 2008).

to this committee was to study the institutions' existing missions and programs to better align their names with national patterns.<sup>18</sup>

At the October 1995 board meeting, the regents had a first reading of the consultants' report on Mission Development and Review. As was customary with reports presented for board approval, the report would be on the table for one month before the board would take action in November. Dr. Johnstone noted in the meeting, "Many other states are experiencing a period of downsizing in their university systems, while Georgia's system is experiencing a period of extraordinary growth."<sup>19</sup> He also stressed that the focus of institutions' missions should be on genuine state needs and student demand and not student and institutional wants.<sup>20</sup> The report recommended an updated evaluation of employment needs by region and by professional and technical area to inform establishment of new programs. The consultants reported, "The review of campuses and off-campus activities was shown to reveal a bewildering array of outreach, extension, and sheer entrepreneurship within the University System of Georgia. This proliferation might result in wasteful duplication of services, diminution of academic standards, and friction within the System, thus calling for greater attention to planning in providing for expanded access and regional coverage."<sup>21</sup> As a result, the board put a moratorium on off-campus activities until a policy could be developed that would involve the board of regents and the chancellor in expansions of off-campus sites.<sup>22</sup>

Most importantly to the institutions, the report proposed changes in the names of

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<sup>18</sup> Minutes, June 1996.

<sup>19</sup> Minutes, 1995-1996, 131.

<sup>20</sup> Ibid., 132

<sup>21</sup> Ibid.

<sup>22</sup> Ibid., 170. Although the minutes do not cite examples of these off-campus activities, it is clear that Portch wanted to curb institutions' establishing multiple off-campus instructional sites without a coherent strategy and established need.

some institutions, particularly for four-year institutions that offered a substantial number of graduate programs. The report advised that such institutions should be named universities.<sup>23</sup> In November 1995, the board approved the consultants' report and received draft individual campus mission statements. At this meeting, the consultants reiterated that the term "university" should be considered for those institutions that have a genuinely significant graduate function and that legitimately include applied research, scholarship, and outreach in their missions.<sup>24</sup> Elifson was quoted as saying, "The issue should be moved beyond simply naming of institutions to an issue of identity for the entire system and its institutions so that the institutions are clearly associated with the University System of Georgia and that their names represent their missions as well."<sup>25</sup> The consultants praised the Policy Direction on Admissions, particularly because it intended to reduce the number of first-time freshmen who would need developmental studies support. The mission review initiative was intended not only to define the missions of the individual institutions, but also the missions of the sectors of institutions, and it was part of the admissions initiative to direct students who needed learning support to the two-year college sector.

Also on the November 1995 agenda of the Committee on Planning and Oversight as a committee of the whole was a report on engineering needs in the state, a report that directly relates to the issue of "mission creep." President Nicolas Henry had successfully lobbied the previous chancellor for regional university status for Georgia Southern University, but what he and certain influential politicians, particularly State Representative Terry Coleman, really wanted for Georgia Southern was an engineering

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<sup>23</sup> Ibid., 132.

<sup>24</sup> Ibid., 170.

<sup>25</sup> Ibid., 171.

school. Indeed, this issue was another matter thrust on Portch from the beginning that had been stewing for some time. According to Fincher, during the Propst administration, “A study conducted by the Southern Regional Education Board did *not* support the state’s need for a second engineering school and, to the contrary, presented evidence that Georgia Tech was not adequately supported in providing engineering programs that had long served state and national needs.”<sup>26</sup> However, those who wanted an engineering school at Georgia Southern saw another opportunity in the new chancellorship. “There were almost from day one people asking the chancellor what he was going to do to produce more engineers,” said Tom Daniel, “and some of that was an outgrowth of the Georgia Southern University’s conversion to a regional university, and what did that mean and how that was going to take shape?”<sup>27</sup> Recognizing that this, like mission review, was a delicate political matter requiring a higher level of objectivity and validity, the Chancellor had contracted with another external consulting firm, MGT of America, to assess state needs and future considerations.<sup>28</sup>

Dr. Kent Caruthers, a senior partner, presented MGT’s report to the board. It recommended that the system monitor engineering needs on an ongoing basis, expand distance education opportunities, and focus more on the Regents Engineering Transfer Program (RETP), a “2+2” program which allowed students to complete the first two years of an engineering program at one of nine system institutions and then transfer to the Georgia Institute of Technology to complete their degrees.<sup>29</sup> The report found that the system graduated fewer engineers than many other states, that unemployment of

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<sup>26</sup> Fincher, 91.

<sup>27</sup> Daniel, interview.

<sup>28</sup> Minutes, 1995-1996, 175.

<sup>29</sup> Ibid., 176.



engineers was at a record high, that the creation of engineering schools in rural communities had no statistically significant effect on the local economy, and that businesses were not currently having difficulty employing engineers.<sup>30</sup> The conclusions of the report were as follows: “(1) even though Georgia has a lower than average number of engineering schools, that does not appear to affect the state’s economy; (2) that engineering employment in the past 5-6 years has been going down, partly because of the end of the cold war; (3) that the engineering technology situation should continue to be looked at, and licensure requirements should not exclude engineering technology graduates; and (4) there should be a renewed focus on [RETP].”<sup>31</sup> In response to anecdotal concerns that students were leaving Georgia to pursue engineering studies in other states, Caruthers stated that a survey of institutions in neighboring states indicated that this was a personal choice of the students rather than an inability to gain admission to Georgia Tech.<sup>32</sup> This and subsequent reports on engineering needs in Georgia would provide Portch with the data to support his decision not to give Georgia Southern an engineering school.

In June 1996, the Board of Regents had a first reading of the recommendations on implementing the Mission Development and Review Policy Directive, which would be voted upon at the July meeting.<sup>33</sup> At this meeting, the board also approved the first 7 of 17 institutional name changes to occur during the Portch administration.<sup>34</sup> The only dissenting vote was made by Regent John Henry Anderson. *The Atlanta Constitution* reported, “Anderson said he objects to the name changes because he believes it will lead

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<sup>30</sup> Ibid.

<sup>31</sup> Ibid.

<sup>32</sup> Ibid.

<sup>33</sup> Minutes, June 1996. Note, the minutes use the word “direction” rather than “directive.”

<sup>34</sup> Ibid.

to request for more funds and programs. Portch said the move is simply a name change and is not intended to imply that schools can expand. No additional funds will be provided, even for new stationary and signs.”<sup>35</sup>

In July 1996, the board approved the mission statements of all 34 system institutions along with the Recommendations on Implementing Mission Development and Review Policy Direction.<sup>36</sup> The board also adopted a set of principles for nomenclature such that institutions that offer both baccalaureate and master’s degrees would be called “state universities,” institutions that offered baccalaureate degrees but not graduate degrees would be called “state colleges,” and institutions that offered only associate-level degrees would be called “colleges.” Those colleges that offered DTAE programs were given the option of being named “community colleges.” The minutes note that name changes in no way implied an expansion of an institution’s mission, academic programming, or budget. Moreover, the minutes explicitly state, “Any future considerations of expanded missions and programs will be based on documented needs, including workforce needs, and will only be considered in the context of overall System planning. Ph.D. programs will be limited to the Research Universities.”<sup>37</sup> Over the next few years, the board would approve name changes for the following institutions:

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<sup>35</sup> Reagan Walker, “Colleges Get New Names, Higher Standards,” *The Atlanta Constitution* ( June 13, 1996), B4.

<sup>36</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia, July 9, 1996, <http://www.usg.edu/regents/minutes/1996/jul96.phtml> (accessed June 13, 2008). Note, in the June 1996 minutes, Elifson noted that Albany State College, Georgia Southwestern College, and Waycross College were undergoing presidential changes and would be allowed to refine their mission statements after the new presidents were on board.

<sup>37</sup> Ibid.

<b>New Name</b>	<b>Previous Name</b>	<b>Date Approved</b>
Albany State University	Albany State College	June 1996
Armstrong Atlantic State University	Armstrong State College	July 1996
Augusta State University	Augusta College	June 1996
Clayton College & State University	Clayton State College	November 1996
Coastal Georgia Community College	Brunswick College	July 1996
Columbus State University	Columbus College	June 1996
Dalton State College	Dalton College	November 1998
Fort Valley State University	Fort Valley State College	June 1996
Georgia College & State University	Georgia College	August 1996
Georgia Southwestern State University	Georgia Southwestern College	July 1996
Georgia Perimeter College	DeKalb College	November 1997
Kennesaw State University	Kennesaw State College	June 1996
Macon State College	Macon College	November 1996
North Georgia College & State University <sup>38</sup>	North Georgia College	November 1996
Savannah State University	Savannah State College	June 1996
Southern Polytechnic State University	Southern College of Technology	July 1996
State University of West Georgia	West Georgia College	June 1996

Most of the name changes were straightforward; however, a few presented challenges. Sharon James noted that nomenclature was one of the more difficult pieces of implementation because, “when you got complaints, frequently it was because people were afraid their alma mater was not going to be recognized.”<sup>39</sup> According to the July 1996 minutes, the regents’ discussion on nomenclature focused primarily on issues at Georgia College and North Georgia College, which were especially problematic. Georgia College, for example, could not simply be named Georgia State University, as there was already an institution with that name. Moreover, the institution proposed to include the

<sup>38</sup> According to the minutes, five regents voted against this name change.

<sup>39</sup> James, interview.

name “Atkinson” in its new name to reflect the founder of the college.<sup>40</sup> At the meeting, Regent Kenneth W. Cannestra noted that the proposed name of Atkinson State University had been well received, and the Chancellor noted that he was planning to meet with the Georgia College Alumni Foundation and alumni leaders to further discuss the name.

With regard to North Georgia College, Regent Edgar L. Jenkins noted that the proposed name change had received opposition from alumni and foundation members. In a previous letter to the Chancellor, President Demas J. Allen had argued:

We understand that in the case of other institution, placing the term “State University” after “Georgia” may imply that the institution is a branch of Georgia State University. In our case however, it is felt that the importance of the identity of the region in the initial portion of our name outweighs any risk of misidentification. Additionally, we feel that “State University of North Georgia” implies membership in some large amorphous system of loosely linked institutions located throughout northern Georgia, an impression we would rather not promote.<sup>41</sup>

Again, the Chancellor agreed to meet with concerned stakeholders, and the actions on these name changes were delayed until those issues were resolved.

While most institutions were ultimately satisfied with their name changes, some interviewees felt that certain institutions were given the name of “university” that perhaps were not in the national norm of what it means to be a university. However, President Thomas Z. Jones of Armstrong Atlantic State University remarked, “That was a feel-good experience. That made the Armstrongs and the Augustas and the Columbuses all

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<sup>40</sup> Letter from President Edwin G. Speir to Dr. Sharon James, May 28, 1996. This document is in storage at the University System Office. It is in the Chancellor’s Office files among the Special Assistant’s files in a file labeled “Mission Review” in a manila folder labeled “Inst. Responses to Mission Report.” A copy of this document is in the author’s possession.

<sup>41</sup> Letter from President Delmas J. Allen to Dr. Stephen R. Portch, May 24, 1996. This document is in storage at the University System Office. It is in the Chancellor’s Office files among the Special Assistant’s files in a file labeled “Mission Review” in a manila folder labeled “Inst. Responses to Mission Report.” A copy of this document is in the author’s possession.

feel good. They were now universities.”<sup>42</sup> Dr. James L. Muyskens, who served as Senior Vice Chancellor for Academic Affairs beginning in summer 1995, stated, “I think that we conceded an awful lot. There was a lot of mission creep.... I think that we allowed title creep as well.” He further remarked, “And I think a lot of the names of the colleges and universities now are not good names. This was, I think, Steve needing to concede something to keep people going.”<sup>43</sup>

Included in the Recommendations on Implementing Mission Development and Review Policy Direction approved at the July 1996 meeting were recommendations for meeting regional needs in metropolitan Atlanta, most notably with regard to Gwinnett County. From the time Portch arrived in Georgia, he was lobbied by the Gwinnett County community to create a four-year college in the area. In a letter dated July 8, 1994, two members of the Gwinnett Chamber of Commerce (including Glenn S. White, who would later become a regent and Chair of the Board of Regents during Portch’s chancellorship) announcing the purchase of a 180-acre parcel of land for the express purpose of building a four-year public college campus.<sup>44</sup> In line with the recommendations of the Mission Review Report, however, the board authorized that DeKalb College and the University of Georgia continue to offer their existing programs in the growing county.<sup>45</sup> In December 1997, the board approved a proposal by President Jacqueline M. Belcher of DeKalb College and President Michael F. Adams of the University of Georgia for a collaborative instructional center in which all freshman and sophomore level courses would be offered

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<sup>42</sup> Thomas Z. Jones, interview by author, Savannah, GA, August 15, 2007.

<sup>43</sup> James L. Muyskens, interview by author, Atlanta, GA, June 7, 2007.

<sup>44</sup> Letter to Stephen R. Portch, Chancellor, from Glenn S. White, Immediate Past Chairman, and John F. Schraudenbach, President, Gwinnett Chamber of Commerce, July 7, 1994. This letter is in storage at the University System Office in the files of the Chancellor’s Office in a file marked Chancellor’s Correspondence. A copy of this letter is in the author’s possession.

<sup>45</sup> Minutes, July 1996.

by DeKalb College with associate's degrees to be conferred by that institution and all upper-division courses would be offered by the University of Georgia with bachelor's degrees, as well as some master's degrees and special certificates, to be conferred by the university.<sup>46</sup> In November 1998, the board approved an innovative master plan for the Gwinnett University Center on the aforementioned property donated by the county. The center was not the stand-alone four-year institution that the county wanted, but it was envisioned as a high-tech distance-learning solution to providing access to critical workforce needs for four-year and some graduate programs through the kind of systemwide collaboration that Portch encouraged.<sup>47</sup>

With regard to the niche missions that Portch envisioned, some institutions fared better than others. Most of the persons interviewed cited Georgia College & State University as the shining star of the mission review initiative. Governor Barnes, who was a legislator in the House at the time, recalled that he had asked Portch why Georgia did not have its own liberal arts college, and Portch responded that if Barnes would give him the funding, he would make Georgia College in Milledgeville the state's own public liberal arts college. Barnes said, "He already knew what he wanted to do with Georgia College.... He saw that it was an opportunity because I had an interest. Boy, he was good about that."<sup>48</sup>

The board appointed President Rosemary dePaolo in July 1997 with the institution's new liberal arts mission in mind.<sup>49</sup> "[Portch] didn't come in and say, 'This is

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<sup>46</sup> Minutes of the Board of Regents of the University System of Georgia, December 9 and 10, 1997, <http://www.usg.edu/regents/minutes/1997/dec97.phtml> (accessed July 16, 2008).

<sup>47</sup> Minutes of the Board of Regents of the University System of Georgia, November 10 and 11, 1998, <http://www.usg.edu/regents/minutes/1997/nov98.phtml> (accessed July 16, 2008).

<sup>48</sup> Roy Barnes, interview by author, Marietta, GA, August 10, 2007.

<sup>49</sup> Minutes of the Board of Regents of the University System of Georgia, July 8 and 9, 1997, <http://www.usg.edu/regents/minutes/1997/jul97.phtml> (accessed July 16, 2008).

exactly what I want you to do,” she said, “There are a whole range of liberal arts institutions, and it was up to us to define what kind of liberal arts institution we were going to be, how we were going to be the state’s public liberal arts institution.”<sup>50</sup>

According to David Morgan, who worked in the Office of Academic Affairs and also served on the staff committee on mission review, the dormitories at Georgia College were in pitiful shape and the enrollments were very low. “Because they had their new mission and there was lots of support, they received a ton of money, and all of their dorms are now up-to-date and they made a name for themselves.”<sup>51</sup> Georgia College & State University now enjoys a reputation as Georgia’s “public ivy.” “DePaolo was exactly what we needed,” said Muyskens.<sup>52</sup> Although some institutions made strides in carving out their own unique niches, most institutions did not specialize to the extent Portch hoped they would. “I know his centers of excellence concept, where every four-year campus was going to be known for something they did better than anyone else, I don’t see that that has matured to the place he hoped it would be,” said Tom Daniel.<sup>53</sup>

Georgia Southern University did not get the niche it wanted. Instead of giving Georgia Southern an engineering school, Portch decided to invest in Georgia Tech and RETP, which would become the Georgia Tech Regional Engineering Program (GTREP). “They did push for an engineering school,” said Barnes, “And Steve and I both said, ‘Let’s build GTREP.’” Portch did not want to diminish the quality and momentum that Georgia Tech had. “We think Georgia Tech is premier because we haven’t diluted those resources,” he explained. “It made no sense to create another engineering school because

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<sup>50</sup> Rosemary DePaolo, interview by author, Wilmington, NC, July 27, 2007.

<sup>51</sup> David Morgan, interview by author, telephone, August 20, 2007.

<sup>52</sup> Muyskens, interview.

<sup>53</sup> Daniel, interview.

it would definitely be inferior,” said Muyskens.<sup>54</sup> “The Georgia Tech program that we put in place down in that area at its time was very innovative,” stated Portch, “and the college that Georgia Southern did get in information technology was far more impactful on the regional economy than a second-rate engineering school would have been.”<sup>55</sup> Governor Barnes allotted \$20 million for a college of information technology at Georgia Southern.<sup>56</sup> “I told Governor Barnes, ‘You’ve got to give us something,’” explained Coleman. “He said, ‘What do we do?’ And I said, ‘You’ve just got to give us an IT school, a stand-alone IT school. It’s been wildly successful, but still, the people who we need to keep us in the race are engineers.’”<sup>57</sup>

Some of the interviewees expressed that part of the controversy over Georgia Southern’s engineering school might have been about regional jealousies. Former Senior Vice Chancellor for External and Human Resources Arthur N. Dunning said:

I think in many ways, this is North Georgia – South Georgia. All the schools in the university system, look how many are in the northern part of the state.... Some folks would say, “Well, that’s where the population is.” Others would say, “Well that’s because you look down your nose at the people down south of Macon.”... Some people would bring that sort of sensitivity.... I’m not suggesting who’s right and who’s wrong. I’m suggesting that sometimes that language is interspersed with a conversation about policy.<sup>58</sup>

Regent Juanita Baranco exclaimed, “Don’t play that card! You’re going to make a decision for South Georgia and kill one of our jewels? Oh no! Doesn’t make sense. So, those policies did literally save Georgia Tech because the state could not afford to not have Georgia Tech be Georgia Tech.”<sup>59</sup> President G. Wayne Clough of Georgia Tech

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<sup>54</sup> Muyskens, interview.

<sup>55</sup> Portch, first interview.

<sup>56</sup> Barnes, interview.

<sup>57</sup> Coleman, interview.

<sup>58</sup> Dunning, interview.

<sup>59</sup> Baranco, interview.



said, “I think that what we tried to do was take an approach that was beneficial to the students.... We tried to say students come first.”<sup>60</sup> Portch admitted that he might have handled things differently. “I tried to argue that it was not a good idea based on the data and the facts rather than on the politics and the emotion, and you know, if I had it to do over again, I’d make exactly the same decision,” he said. “I would communicate it differently. Whether that would have made any difference, I don’t know, but the only way you can please all of the people all of the time is to say yes to everything they want, and we just weren’t prepared to do that. It was not part of the strategic plan. It was not part of the mission review.”<sup>61</sup>

However, Coleman is still not satisfied. When asked about GTREP, he responded that it was a “farce.”<sup>62</sup> “And we will regret it as a state,” he said, “And the regents will regret it as a system one day.”<sup>63</sup> Portch said, “I’d be naïve to say politics doesn’t enter into probably most, if not all, higher ed decisions, but I didn’t want it to be the first consideration. I wanted need – what’s best for the region, what’s best for the state – to be the first consideration. I tried to stay true to that throughout, which has its consequences.”<sup>64</sup> The regents interviewed all supported Portch in this decision. Regent Dwight Evans stated, “I think that’s an example of where Stephen Portch had a great deal of courage and that he did what was right for Georgia and did not take the easy political way out.”<sup>65</sup>

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<sup>60</sup> Clough, interview.

<sup>61</sup> Portch, first interview.

<sup>62</sup> Coleman, interview.

<sup>63</sup> Ibid.

<sup>64</sup> Portch, first interview.

<sup>65</sup> Evans, interview.

The mission review process succeeded at creating a more systematic university system. “It created sectors for the first time that had meaning,” said Cathie Hudson, “And then, on the mission side, we identified common characteristics, or defining characteristics, of a sector that would empower that sector to do what was needed but would also put some limits there.”<sup>66</sup> As the admissions standards would rise in the other sectors as part of the Admissions Policy Directive, two-year colleges would become “points of access” where students who needed learning support could receive it at a lower cost to them and to the state. The stratification of the institutions into better defined sectors also complemented the Tuition Policy Directive under which a tiered tuition structure ensured that the cost of tuition at research universities was raised at a proportionately higher rate than tuition at the two-year colleges. In fact, in fiscal year 1996, the tuition rate at two-year colleges actually dropped 5% per quarter (full-time) from the previous year.<sup>67</sup> Additionally, by fall 1998, out-of-state students in the University System of Georgia would pay the full cost of their instruction.<sup>68</sup> “The grand effect of that was to almost eliminate, not completely, but almost eliminate learning support at the state universities, regional universities, and research universities for traditional freshmen,” said Hudson.<sup>69</sup> “I thought mission review was the absolute best way to begin his tenure,” said President Dorothy Lord of Coastal Georgia Community College. “It was very clear in those days that you had a mission and you should stick to it.”<sup>70</sup>

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<sup>66</sup> Hudson, interview.

<sup>67</sup> University System of Georgia Tuition Fees – Percentage Increase for Resident, Full-Time Students, report provided by the Office of Planning and Policy Analysis. (A copy of this document is in the author’s possession.)

<sup>68</sup> Minutes, 1994-1995, 249.

<sup>69</sup> Hudson, interview.

<sup>70</sup> Lord, interview.

*Early-Semester Calendar Policy Directive*

In February 1995, the Board of Regents authorized the implementation of a semester conversion study, thereby authorizing the Chancellor “to determine if a satisfactory plan can be worked out for converting the University System’s institutions to a semester calendar of study.”<sup>71</sup> The Early-Semester Calendar Policy Directive was based on Principles 1, 8, 10, and 19, and its goal was “to complete a Systemwide shift to a semester program, contingent on a successful implementation plan, within the next three years, with no increase in continuing costs nor decrease in intraSystem transfer adverse impact on the System’s partnerships with DTAE and K-12.”<sup>72</sup> As with mission review, Portch did not consider semester conversion to be one of the most central pieces of the strategic plan; however, like mission review, it may have been a necessary evil. “I mean, Stephen Portch didn’t come with this agenda so much as he got hit with it as soon he was here because UGA had been pushing for a number of years for semester conversion,” explained Dr. Martha Nesbitt, who was Interim President at DeKalb College at the time.<sup>73</sup> Nesbitt had served on the previous semester conversion taskforce under Chancellor Propst that had recommended converting the system to semesters, but the recommendation never made it to the board level.<sup>74</sup> According to *The Atlanta Journal-Constitution*, “The Board of Regents staff first studied the issue more than 15 years ago. Since then, the issue has bubbled up from time to time, most recently when the

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<sup>71</sup> Minutes, 1994-1995, 202.

<sup>72</sup> Early-Semester Calendar Policy Directive, Adopted by the Board of Regents, February 8, 1995. (A copy of this document is in the author’s possession.)

<sup>73</sup> Martha T. Nesbitt, interview by author, Gainesville, GA, July 5, 2007.

<sup>74</sup> Ibid.

University of Georgia asked that semesters be considered in 1990. That request didn't get past then-Chancellor Dean Propst."<sup>75</sup> Regent McMillan recalled that the debate over semester conversion had been going on for many years:

The semester bit, for instance, had been going on almost since I've been on the board, but it's one of things that no one really wanted to tackle, I guess, or no one really dealt with.... Over the years, many regents and chairs of the board had taken the position that they wanted to see us move from quarter to semester to bring us more in line with what goes on in the universe of higher ed institutions. But here again, the "if it ain't broke, don't fix it" attitude came to the surface, and people came up with all the reasons why it wouldn't work.<sup>76</sup>

Portch saw this difficulty as yet another opportunity. "I quite frankly didn't have a strong preference one way or another, but I hate debates that never end. They just sap energy.... We were just tying ourselves in knots perennially with this," he said.<sup>77</sup> Portch felt that the recommendation to convert to semesters had already been made under Chancellor Propst, and he saw a unique opportunity here for curricular review and revision. "For me, the ability to revise every single course tipped the balance," he explained. "What better way to get curricular review and revision than to convert to semesters? It forced that issue, and it was long overdue for people to reevaluate the core curriculum, to reexamine at how they taught."<sup>78</sup> So Portch's concern was not whether the system should convert to semesters but how to do so. "You notice we called it the 'Early-Semester Calendar' rather than the 'Quarter to Semester Conversion' to keep people focusing on where we were going rather than where we'd come from," noted Bremer.<sup>79</sup> She also recalled that Portch thought that the conversion exercise could be good in and of

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<sup>75</sup> "Chancellor Wants Regents to Decide on Semesters," *The Atlanta Journal-Constitution*. February 7, 1995, D1.

<sup>76</sup> McMillan, interview.

<sup>77</sup> Portch, first interview.

<sup>78</sup> Ibid.

<sup>79</sup> Bremer, interview.

itself. “Another kind of keynote was change. He believed that change was good if for no other reason than for shaking people up and getting them to rethink things, and that came up particularly in the semester conversion project, and I always thought of it as semester conversion,” said Bremer.<sup>80</sup> “He was thinking very much of his experience working as the senior vice president for academic affairs with faculty and how easy it is for faculty to get into a set of things that they always do every year in the same order, and his conviction that it would be good for faculty to rethink what they covered and how they covered it and in what blocks they were going to cover it.”<sup>81</sup>

Although the potential for curricular revision was the deciding factor for Portch, his primary justification for converting to semesters was the notion of national preeminence. Bremer explained, “When we did the vision statement, we made sure that the notion about national patterns of excellence got into the vision statement, and that was one of the things that we used to articulate the importance of semesters, that going to semesters was going to align the University System of Georgia better with textbook availability, what was happening in other places, just a whole national set of how education operates.”<sup>82</sup> Weber stated, “The standard was changing across the nation, and we were very slow to change with it... but most of the nation was on the semester system and the chancellor definitely wanted to go that way. I don’t know that the board would have cared, but they were going to follow him because everything was about best practices. That’s what we were doing in the strategic plan: best practices of things that were going on across the nation.”<sup>83</sup> Portch used national data to support the conversion to

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<sup>80</sup> Ibid.

<sup>81</sup> Ibid.

<sup>82</sup> Ibid.

<sup>83</sup> Weber, interview.

semesters. *The Atlanta Journal-Constitution* quoted, “About 62 percent of all colleges and universities in the country are on the semester system; 21 percent are on the quarter system; and 17 percent have other arrangements such as trimesters. In 1994, 22 schools dropped the quarter system in favor of semesters, Portch said.”<sup>84</sup>

Having served on the previous taskforce to study semester conversion, Nesbitt was a natural choice to be selected by Portch as co-chair of the new taskforce on semester conversion. “The one thing that I had to tell people over and over again that our committee was not to debate semester conversion; our committee was to work out the details,” she stated. “And that was the one thing that Stephen Portch was really good about. He could grasp concepts, but before he moved forward, he would have the details worked out. He would always say, ‘The devil’s in the details,’ and that’s why he didn’t ask the board to approve going to semesters before he had worked out the details – or we had worked out the details – of how to move it forward.”<sup>85</sup>

The other co-chair of the semester conversion taskforce was Dr. Donald Wagner, who had been on the political science faculty of West Georgia College since 1975 and was at the time Executive Secretary for the Georgia Conference of the American Association of University Professors (AAUP).<sup>86</sup> Knowing that he planned to impose a curricular review as part of the semester conversion effort, Portch wanted to have strong faculty representation on the taskforce. “I’m sure that’s why Don was asked, because Stephen Portch was very strategic,” said Nesbitt. “Asking Don as the head of AAUP to be the co-chair was a very smart thing to do.”<sup>87</sup> Wagner said of the process, “You know,

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<sup>84</sup> “Chancellor Wants Regents to Decide on Semesters.” (The article did not cite Portch’s data source.)

<sup>85</sup> Nesbitt, interview.

<sup>86</sup> Donald R. Wagner, interview by author, Carrollton, GA, July 19, 2007.

<sup>87</sup> Nesbitt, interview.

[Portch's] metaphor for all this was it's like an apple cart.... What he wants to do is dump everything out. The University System is the apple cart. He dumped everything out of it, and he'd pick up the good apples and leave the junk on the ground, and that's a rather revolutionary way to do things, but that's what he was about. That's what he was up to.”<sup>88</sup>

It was evident early on that semester conversion was going to be difficult in terms of creating engagement and consensus. People at the Georgia Institute of Technology in particular were strongly opposed to the conversion. *The Atlanta Journal-Constitution* reported, “Tom Akin, director of the cooperative education program at Georgia Tech, said converting to semesters could cripple his program, which allows about 3,100 students to alternate between studying a quarter and working a quarter in a job related to their field of study.”<sup>89</sup> At least a few regents were concerned about the implications of converting the system, especially in terms of cost. *The Atlanta Journal-Constitution* further reported, “Concerns over the impact on such programs and unknown costs of converting courses and catalogs has left Regent Thomas Allgood skeptical: ‘I have serious doubts about it.’”<sup>90</sup> However, only Regent John Henry Anderson actually voted against the policy directive.<sup>91</sup> Bremer stated that there were regents who were uncertain about the move to semesters. She said, “And my memory is that Steve was pretty clear we will not do this unless we can do it in a way that meets your concerns.”<sup>92</sup> However, Bremer also noted, “Steve was concerned that that semester thing might be the end of the

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<sup>88</sup> Wagner, interview.

<sup>89</sup> “Chancellor Wants Regents to Decide on Semesters.”

<sup>90</sup> Ibid.

<sup>91</sup> Minutes, 1994-1995, 202.

<sup>92</sup> Bremer, interview.

honeymoon.”<sup>93</sup> Clearly, Portch understood that semester conversion would be the most challenging aspect of the strategic plan.

The semester conversion taskforce was made up of 16 individuals from 15 representative institutions, as well as Vice Chancellor for Student Services Barry A. Fullerton from the system office.<sup>94</sup> The representatives included one student, five faculty members, and several administrators. Wagner recalled, “You had some heavy hitters on this committee who perhaps had decided views and some with marching orders. It was Georgia Tech, over their dead body, were we going to move from the quarter calendar, UGA, over their dead body, would we not move to semesters.”<sup>95</sup> However, he said, “There were a lot of people on the committee who didn’t have an opinion one way or the other. I didn’t have an opinion one way or the other. Martha Nesbitt didn’t. We were just trying to do the best for the System.”<sup>96</sup> Nesbitt remarked, “It was probably the hardest, or the most challenging assignment I ever had.”<sup>97</sup> Wagner elaborated, “You think it’s just a question of sitting down and figuring out how to do it. Well, no it’s not, because you have these people. It’s a political [process] as much as anything else.”<sup>98</sup>

According to the Report of the Task Force on Implementation of Semester Conversion, the committee met for the first time in March 1995. At that meeting, the committee established three subcommittees to address three specific types of issues: student services, curriculum, and faculty workload. The subcommittees met numerous times, and the full taskforce met again in May and June. Additionally, Nesbitt and

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<sup>93</sup> Ibid.

<sup>94</sup> Report of the Task Force on Implementation of Semester Conversion, October 1995, University System of Georgia, hereafter cited as Semester Conversion Report. (A copy of this document is in the author’s possession.)

<sup>95</sup> Wagner, interview.

<sup>96</sup> Ibid.

<sup>97</sup> Nesbitt, interview.

<sup>98</sup> Wagner, interview.



Wagner contacted each of the institutions and asked that they establish their own committees on semester conversion and appoint liaisons to provide feedback to the taskforce. In the spring, Nesbitt and Wagner attended the meeting of the University System Administrative Committee on Academic Affairs to discuss semester conversion, and in July, they met with the institutional liaisons who were not on the taskforce. In addition, members of the taskforce also met with the advisory committee on undergraduate education that had been charged with redesigning the core curriculum, which was originally approved by the Board in 1967. The taskforce subcommittees submitted draft reports that were submitted to the full taskforce at its August 20-22, 1995, meeting.<sup>99</sup>

The taskforce reviewed extensively calendar conversions of other systems and institutions around the nation, and their research confirmed what Portch had asserted. “Nobody, nobody, system or institution, had gone from semesters to quarters. Every change had been to semesters or trimesters, every single one,” said Wagner. “Now, there are some really good institutions that are still on the quarter system, but everything was trending the other way.”<sup>100</sup> That did not imply, however, that semester conversion would be easy. “And I talked to some people who had been in universities where they had converted from quarters to semesters, and it doesn’t seem to me that it was ever an easy conversion anyplace that it happened,” said James.<sup>101</sup> She noted, “People, as I said, they don’t like change.”<sup>102</sup>

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<sup>99</sup> Semester Conversion Report.

<sup>100</sup> Wagner, interview.

<sup>101</sup> James, interview.

<sup>102</sup> Ibid.

By the time Nesbitt and Wagner brought forward the taskforce report to the board, they believed the committee had identified and addressed most of the major issues. With regard to Georgia Tech's expressed concerns about its co-op program, President G.

Wayne Clough stated:

I think some of my alumni and probably some of our faculty were more passionate about the issue than I was.... My feeling was you could teach engineering and science and the things that we are focused on very well under either system. I didn't think that was a problem. The challenge was to make the co-op system work, and what we heard was an interesting message from employers, and that was, 'We're glad you're going to the semester system because we think having the students for three months is not nearly as efficient as having them for four and a half or five months because we can more effectively work with them if they are here longer.' And in fact, Georgia Tech was out of step with most universities... and most of the co-ops that were hiring were coming from semester-based schools. And so the employers said this is a good thing because you're going to get more in-step with what we have to do to accommodate co-ops.<sup>103</sup>

Georgia Tech was given until fall 1999 to convert to semesters due to the disruption at the institution caused by its unique role in the 1996 Olympic Games.<sup>104</sup>

Even though the taskforce had worked out the conversion details to the satisfaction of most board members, Regent Anderson was still not persuaded. Wagner recalled, "Anderson was the most vocal critic (on the board).... Before we came to the board with our final report, he was making all this noise about the cost."<sup>105</sup> So Chancellor Portch asked Wagner to go with him to Hawkinsville to visit Regent Anderson and try to persuade him that semester conversion was the right direction for the system. At the end of the day, Wagner felt that they had failed in their mission, but Portch thought otherwise. Wagner recounted what Portch said to him that day: "I didn't want you to convince him,

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<sup>103</sup> Clough, interview.

<sup>104</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia, February 11 and 12, 1997, <http://www.usg.edu/regents/minutes/1997/feb97.phtml> (accessed May 21, 2008).

<sup>105</sup> Wagner, interview.

because I didn't think either of us could,' [Portch] said. 'But I wanted to hear all of his arguments so when he raises them at the board [meeting], I can answer them.'" Wagner remarked, "And I thought, that's really smart! So he's ahead of the game all the time, and he always was."<sup>106</sup>

In November 1995, Nesbitt and Wagner presented to the board a first reading of the taskforce report, which recommended that all institutions in the system convert to a common semester calendar by fall 1998 at the earliest.<sup>107</sup> The primary reason for that timeframe was the need for curricular review of every single course in the system, but more specifically, the need to prune baccalaureate programs back to four years. Over the course of time, many four-year programs had experienced "credit creep" in which courses were added to the programs, which resulted in students taking longer than four years to complete a program. "If you simply converted, you would have degree programs that were five years.... The committee was unanimous all the four-year degrees had to be 120 hours," said Wagner. "That came from us. It actually came from me. I mentioned it to Martha [Nesbitt]. I said we have to do this, or it isn't going to work."<sup>108</sup> The taskforce recommended combining courses or eliminating course redundancies to address this problem in the best interest of the students.<sup>109</sup> The minutes of the November 1995 board meeting note, "There would be beneficial consequences to flow from this comprehensive redesign of the curriculum: (1) more students would finish in a reasonable time, reducing the time and cost to them and to the taxpayers and (2) access to higher education would be increased as the enrollment bulge caused by students in their fifth year would be

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<sup>106</sup> Ibid.

<sup>107</sup> Semester Conversion Report. Minutes, 1995-1996, 179.

<sup>108</sup> Wagner, interview.

<sup>109</sup> Minutes, 1995-1996, 180.

eliminated.”<sup>110</sup> Wagner noted in the board meeting that there would be a few programs in the system, such as engineering, that might require more than 120 semester hours to complete, but such programs would be considered on a case-by-case basis by the board.<sup>111</sup>

The taskforce further recommended, “Curricular changes must be initiated and developed by the faculty, and there must be time for them to review, revise and make recommendations about the curriculum. The proposed changes must then make their way through the governance structure of the institutions.”<sup>112</sup> The taskforce acknowledged that there might be some challenges in the area of science and engineering laboratories, “but they felt that the one-time costs associated with these problems would enhance students’ education and help the System move toward national pre-eminence.”<sup>113</sup> The system and institutions also needed time to develop materials to inform students, parents, and citizens about semester conversion. Additionally, the taskforce reported that faculty would need additional training in the area of student advisement. Moreover, the taskforce recommended that any changes in the core curriculum should be approved by early 1996.<sup>114</sup> The taskforce noted that with the academic year divided into two terms instead of three, there would be a savings of time and money generated by the elimination of one final examination period and one registration period among other efficiencies gained.<sup>115</sup>

When it came time for the regents to ask questions, it was Regent Edgar Rhodes who asked about the impact of semester conversion on the co-op program at Georgia

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<sup>110</sup> Ibid.

<sup>111</sup> Ibid.

<sup>112</sup> Ibid., 179.

<sup>113</sup> Ibid.

<sup>114</sup> Ibid.

<sup>115</sup> Ibid., 180.

Tech, but Regents Kenneth W. Canestra and A. W. “Bill” Dahlberg both responded that that the majority of co-op students at their companies, Lockheed Martin Corporation and Southern Company, respectively, were on the semester system and it made no difference.<sup>116</sup> Dr. Wagner added that most engineering schools were already on the semester calendar.<sup>117</sup> As expected, Regent Anderson expressed concern about the cost of conversion, suggesting it would require a significant increase in faculty size. He asked whether the pruning of credit requirements would reduce the potential costs, and he also wanted to know what would prevent further credit creep. “Dr. Wagner answered Regent Anderson’s question by referring to the provision on page 3 of the report that would limit credit creep,” read the minutes. “He also reiterated the costs savings discussed earlier.”<sup>118</sup> In reference to program requirements, “The Chancellor noted that such situations would not come to the Board’s attention unless credit limits were exceeded; that the Board’s concern would be the total number of credits not the combinations within programs. The Board’s concern should be with the total number of credits required because that was where cost to the students and taxpayers would be involved.”<sup>119</sup> It is worth noting that Portch was subtly instructing the regents on their role in this endeavor. It was their responsibility to ensure that a program would not grow beyond 120 credit hours, but the content of that program was not their purview. That was the role of the faculty.

In December 1995, the Board of Regents approved the implementation plan for semester conversion, but Regent Anderson again opposed the motion.<sup>120</sup> At the board meeting, the taskforce reported that converting to semesters would cost the system \$5.2

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<sup>116</sup> Ibid., 181.

<sup>117</sup> Ibid.

<sup>118</sup> Ibid.

<sup>119</sup> Ibid., 182.

<sup>120</sup> Minutes, 1995-1196, 230.

million, primarily for curricular redesign.<sup>121</sup> “Once in place, the new schedule would cost no more than the current one if savings are realized through ‘judicious pruning, bold innovation and a reduction in the credits required for graduation,’ the task force reported.”<sup>122</sup> *The Atlanta Journal-Constitution* reported, “Chancellor Stephen Portch... is insisting on a no-cost approach. Some savings could come from having two, instead of three, yearly registrations, commencements and sets of exams.”<sup>123</sup> The paper also stated, “The move is expected to cost about \$5.2 million, but Chancellor Stephen Portch said once the conversion is complete, it should cost no more to run colleges on the semester system than on the quarter system.”<sup>124</sup>

Unfortunately, Portch’s insistence on a “no-cost approach” would come back to haunt him three years later when the semester conversion took effect in fall 1998. In fiscal year 1998 (July 1, 1997, to June 30, 1998), the system experienced record high enrollments as many students hurried through their programs to graduate prior to the conversion.<sup>125</sup> However, in fall 1998, credit hour production declined across the system as many students reacted to the transition by enrolling in fewer courses.<sup>126</sup> No one in the system office had taken into account that the funding formula, which was based on quarter credit hours generated, would be dramatically affected due to the drop in credit hours and the switch to semesters. Shelley Clark Nickel had recently been hired from the

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<sup>121</sup> Doug Cumming, “College Semester Switch Appears Set,” *The Atlanta Journal-Constitution* (December 15, 1995), D2.

<sup>122</sup> Ibid.

<sup>123</sup> Ibid.

<sup>124</sup> Reagan Walker, “Regents Switch from Quarters to Semesters, Starting in ’98,” *The Atlanta Constitution* (December 14, 1995).

<sup>125</sup> Quarterly Enrollment Reports, Fiscal Year 1998, <http://www.usg.edu/research/students/enroll/fy1998/> (accessed May 21, 2008).

<sup>126</sup> Roy E. Barnes and Bill Tomlinson, *The Governor’s Budget Report, Fiscal Year 2001* (Atlanta: Office of Planning and Budget, 1999), 478. (This document is available at the Governor’s Office of Planning and Budget.) Note, the University System of Georgia’s budget request cited an 11.6% decline.

Governor's Office of Planning and Budget to be the system's budget director when she discovered the problem: "I remember having to tell that to [Senior Vice Chancellor for Capital Resources Lindsay Desrochers] and the Chancellor, and it was one of those bleak days."<sup>127</sup>

The university system's funding formula took an enormous blow in fall 1998 when a 9.5% drop in credit hour production resulted in a reduction of approximately \$103.8 million in instructional funding in the fiscal year 2001 budget.<sup>128</sup> The University System of Georgia's Fiscal Year 2001 Budget Request included a 1.5-page explanation of the effect of semester conversion on credit hour production and requested that the system be held harmless for the decline. The first paragraph of this section of the budget request stressed that the drop in credit hour production was expected to be temporary and that the request to be held harmless would cost the state no new monies:

Over the past year the University System of Georgia has been implementing an important change in the academic schedule – from a quarter to a semester system (over 65% of institutions nationally are now on semester systems.) This change has created what is projected to be a temporary loss in credit hour production that, in turn, affects the funding formula for FY 2001. Despite the downturn, there is every reason to expect that student enrollment will soon recover to previous levels significantly by 2003. In light of this, the Board of Regents proposes to ameliorate the immediate enrollment impact of semester conversion by maintaining funding for the enrollment component at the FY 2000 level. This strategy would cost the state no new funds, would assure that the University System of Georgia is prepared for the growing student population and would ensure the continued momentum of higher education in Georgia to the benefit of the Governor and General Assembly's stated intentions for economic development.<sup>129</sup>

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<sup>127</sup> Nickel, interview.

<sup>128</sup> Roy E. Barnes and Bill Tomlinson, *The Governor's Budget Report, Fiscal Year 2001* (Atlanta: Office of Planning and Budget, 1999), 478. (This document is available at the Governor's Office of Planning and Budget.)

<sup>129</sup> Board of Regents of the University System of Georgia FY 2001 Budget Request, 6. (This document is on file with the University System Office of Fiscal Affairs. A copy of this document is in the author's possession.)

The General Assembly did not maintain funding at the fiscal year 2000 level, but it instead appropriated approximately \$47.4 million in the fiscal year 2001 budget, \$18 million in the fiscal year 2002 budget, and \$27.7 million in the fiscal year 2003 budget in “funds to offset funding challenges due to semester conversion.”<sup>130</sup> Portch explained, “What we said is that once you flush the students out of the system who used to know the quarter system, that will disappear. That’s exactly what happened.”<sup>131</sup>

When the issue came to light, Representative Coleman in particular was publicly very critical of the misstep, and in his interview, he said, “He misled us. As I said, he said it wouldn’t cost any money, and it wound up costing a *lot* of money. I want to emphasize that.”<sup>132</sup> By the time the credit hour figures were in play in the fiscal year 2001 budget request, Governor Miller was no longer in office to defend Portch and many legislators were ready to attack the man who had been the golden child of the Miller administration. “A lot of the old boys (legislators) didn’t like him because he was change. Change is always met with resistance,” explained Governor Barnes. “He was changing things, and in particular when he started raising the standards to the University of Georgia, everybody’s kid wasn’t getting admitted, and boy, that caused some problems. I told him, ‘You know, you got guts, not much sense, but you got guts.’”<sup>133</sup> Richard A. Skinner, who was President of Clayton State University at the time, remarked, “I think if there was a big flaw in those years, it was that he didn’t understand – any of us really understand enough – what the quarter to semester [conversion] would mean. As a result, some of the

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<sup>130</sup> Roy E. Barnes and Bill Tomlinson, *The Governor’s Budget Report, Fiscal Year 2001* (Atlanta: Office of Planning and Budget, 1999), p. 478; *The Governor’s Budget Report, Fiscal Year 2002 2001* (Atlanta: Office of Planning and Budget, 2000), p. 440.; Roy E. Barnes and Bill Tomlinson, *The Governor’s Budget Report, Fiscal Year 2003 2001* (Atlanta: Office of Planning and Budget, 2001), p. 351.

<sup>131</sup> Portch, second interview.

<sup>132</sup> Coleman, interview.

<sup>133</sup> Barnes, interview.



anger that was growing toward Portch and toward the university system, they finally had an Achilles' heel they could go after, and boy, they went after it with gusto, both barrels blasting!"<sup>134</sup> Steven W. Wrigley, who was Governor Miller's Chief of Staff, stated, "That was a very difficult and tough political issue, and it clouded every other issue several years running. It made it very difficult to get attention to other issues and to get funding for other things."<sup>135</sup> Nonetheless, Portch noted that Governor Roy Barnes was supportive of the system during those difficult years. Barnes also stated, "I stuck with him on that, and we came through it."<sup>136</sup>

Following the fiscal year 2001 budget cycle, the system office worked with the Office of Planning and Budget and the Legislative Budget Office to modernize the funding formula, which was created in the early 1960s and had not been updated since 1981, to reflect the switch to semesters.<sup>137</sup> The fiscal year 2002 budget reflected an adjustment in the instructional productivity ratio of credit hours to academic positions.

According to former Vice Chancellor for Fiscal Affairs William R. Bowes:

My sense is that there was the idea that [semester conversion] is a good thing to do and whatever happened would work itself out over time, which in fact, it has. But at the time, I don't think there was that kind of planning done, especially on the financial side, to anticipate what the impact was going to be on the formula. Now that said, I think there's two pieces of that. I think certainly, there is evidence to show that there was a dramatic drop in credit hours that students were taking. That changed dramatically, and that showed up in the formula. But by the same token... [the budget] should have been adjusted a little bit better to recognize that change, and what I mean by that is the formula uses faculty workload, it uses class size, it makes some judgments about that. And a lot of that was not

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<sup>134</sup> Skinner, interview. (The anger to which Skinner is referring was likely due to the fact that some legislators may have felt less influential in the University System of Georgia during the Portch administration, a point which will be expanded in the next chapter. Part of it was also likely due to the fact that admission to the University of Georgia became increasingly competitive, resulting in great consternation in certain circles.)

<sup>135</sup> Wrigley, interview.

<sup>136</sup> Barnes, interview.

<sup>137</sup> University System of Georgia Fiscal Year 2002 Budget Request, 6. (This document is on file with the University System Office of Fiscal Affairs. A copy of this document is in the author's possession.)

discussed beforehand when this kicked in, and it was kind of a last-minute scramble to make changes in the formula to accommodate the change. I think if there'd been some preplanning done, that when we went in and looked at the formula and that ought to have been changed because of the changes in quarter to semester hour, there might have been a better result. I'm not saying that it still wouldn't have resulted in a reduction of funding, but it might not have been as severe.<sup>138</sup>

Why better preplanning was not done is unclear. The Report of the Task Force on Implementation of Semester Conversion stated, "One concern that has been expressed, but which is difficult to forecast, is a temporary enrollment decline in commuter institutions that enroll a large number of part-time students. Even though 'educating' the public about the conversion can help alleviate the problem, planning should allow for such an occurrence."<sup>139</sup> The report also states, "It will be necessary for the System to work closely with the State Office of Planning and Budget to accommodate this transition."<sup>140</sup> Whether the concerns of the taskforce were taken into consideration of the funding formula is unknown. In his interview, Wagner said, "Martha [Nesbitt] and I both told [Portch] you can't lose that little percentage. Five [quarter hours] doesn't equal three [semester hours]. Three doesn't equal five. And if you do formula funding that way, you're talking about a lot of money. He didn't want to hear it."<sup>141</sup> Nesbitt did not state that they warned Portch, but she said:

The one mistake we made was that we did not look at how it was going to impact the formula. And we did have somebody on the committee who was a chief finance officer, but he didn't pick up on that, and apparently, because other states aren't funded the way we are, when we looked at other states like Michigan and Florida that had gone to semesters, it never became an issue. And that was the one thing that Stephen Portch took such a hit on was that when it hit our enrollment – not our enrollment so much as FTE – that the legislators said, 'Well, if you want formula funds here, you don't need all this money,' and that was not really the

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<sup>138</sup> William R. Bowes, interview by author, Atlanta, GA, August 2, 2007.

<sup>139</sup> Semester Conversion Report, 2.

<sup>140</sup> Ibid, 16.

<sup>141</sup> Wagner, interview.

case.... I still don't know how it would have been done, but I know there was a way to do it that would have been different. We should have included with that going to the legislature and saying we need to redo our formula. It's not just five quarter hours to three semester hours. And then, that way, it wouldn't have hurt the System so much.<sup>142</sup>

It is important to note that the senior vice chancellor for capital resources and vice chancellor for fiscal affairs were both new hires from outside the system who may not have understood the implications a credit hour drop would have on the system's funding formula.<sup>143</sup> Certainly, some loss in credit hours was attributable to students' reluctance to take five classes in one term when they had previously taken three. Moreover, these were the early years of the HOPE Scholarship Program, and many students were struggling to retain their scholarships. "Well, when they figured out early on that they could keep their HOPE Scholarship a lot easier with 12 hours than 15, they could do it under semesters; they could not do it under quarters," explained Nesbitt. "So that was the one thing that the committee did not anticipate, and that was the one drawback. If there was a drawback to going to semesters, it was the fact that we didn't take into account the formula as it operated and the HOPE Scholarship, but everything else... semester conversion was a fairly non-event, and we did need to be in line with the rest of the country."<sup>144</sup> Additionally, some of the enrollment recovery may have been delayed due to Georgia's strong economy around the turn of the century.<sup>145</sup>

What is clear is that Portch was completely unaware how drastically semester conversion would affect the funding formula. "I don't think any of us anticipated it," said

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<sup>142</sup> Nesbitt, interview.

<sup>143</sup> Minutes, 1995-1996, 100.

<sup>144</sup> Nesbitt, interview.

<sup>145</sup> James Salzer, "College Enrollment Slows: Strong Economy Blamed for Failure of Some Schools to Meet Targets," *The Atlanta Constitution* (May 11, 2000), D8.

President Lord, “certainly not at the level it occurred.”<sup>146</sup> Bremer stated, “[Portch] was quite convinced that along with long-term savings and cost to students of textbooks, for instance, and along with long-term savings and the cost to the system by having just one calendar that was operating or one general calendar that was operating, there would be payoff in faculty meeting to rethink how they taught, and that was really one of the primary benefits that he saw in that conversion process.”<sup>147</sup> “Steve wasn’t great with numbers,” said G. Wayne Clough, former President of the Georgia Institute of Technology, with a laugh. “You know, he was an English major.”<sup>148</sup> Former Senior Vice Chancellor for Academic Affairs James L. Muyskens stated, “He had said it was revenue neutral, and... few things are.... I know for a fact that he wasn’t a liar. He believed that. He truly believed that.”<sup>149</sup>

Despite the unintended consequences of enrollment declines, there were still the intended benefits of curricular review. Consistent with the recommendation of the taskforce, the board approved a new core curriculum in April 1996.<sup>150</sup> The original core had been approved by the board in 1967.<sup>151</sup> The revised core would be implemented with semester conversion in fall 1998 and would require that all students gain mastery of the writing and mathematical skills essential for college level work in addition to taking courses in the humanities, fine arts, social sciences, natural sciences, mathematics, and technology. However, the most important feature of the new core was that it would strengthen transferability among system institutions.

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<sup>146</sup> Lord, interview.

<sup>147</sup> Bremer, interview.

<sup>148</sup> Clough, interview.

<sup>149</sup> Muyskens, interview.

<sup>150</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia, April 9 and 10, 1996, University System of Georgia, <http://www.usg.edu/regents/minutes/1996/apr96.phtml> (accessed May 21, 2008).

<sup>151</sup> Ibid.

For Muyskens, the opportunity to revise the entire curriculum was part of what attracted him to the position of Senior Vice Chancellor for Academic Affairs. “That was a really, really significant thing for my role as the [chief academic officer],” he said. “It was the way in which you could make every faculty member have to look at every course.... That was something that Steve was planning to do before I came, so I said, ‘If you’ll do that, I’m coming,’ because that was the way in which, as I said, everybody had to be engaged.”<sup>152</sup> It is important to note that the revision of the core curriculum and its accompanying standard course numbering system was mandated as part of the policy directive and not something with which the semester conversion taskforce itself was necessarily in agreement. In his interview, Wagner stated, “It was the unanimous opinion of the semester conversion task force to leave the core alone as much as we could. After all, we’re telling [the faculty] to cut back to 120 hours for four-year degrees.”<sup>153</sup>

Dr. Sue Henderson, who was then on the mathematics faculty at DeKalb College, was a member of the systemwide committee to reengineer the mathematics curriculum. She said the faculty were already wondering, “Why would we take a calculus course, which logically is broken in three pieces, and now break it in two? Then, what was even more difficult for us to get our heads around was that in the process of doing the semester conversion, we were asked to all take our courses, our coursework, and narrow it down to 120 hours. That was very difficult.”<sup>154</sup> On pruning degree requirements to 120 hours, Muyskens responded, “Boy did I have to work at that and fight. There was tremendous pushback, and often the pushback was, ‘You’re diluting quality.’ We were saying, ‘No.

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<sup>152</sup> Muyskens, interview.

<sup>153</sup> Wagner, interview.

<sup>154</sup> Sue Henderson, interview by author, Atlanta, GA, June 7, 2007.

We have to do truth in advertising.’ That’s a term Portch loved. You’re saying you can come here and you can get a four-year degree. Then let’s make it happen.”<sup>155</sup>

In the final analysis, Henderson had an appreciation for the initiative. “The way our president sold it to us was the idea that Portch had come up with, is that if they finished the... associate’s degree at a two-year school that the senior college had to take all the credits if you didn’t change your major. That was a real boost to us because it meant our students, we hoped, would begin to stay around an additional year, and a lot of them [previously] would transfer after a year and a half.”<sup>156</sup> Not only was the plan intended to keep students at the two-year level the full two years, but again, the focus was on systemwide transferability of core courses. “Certainly as a two-year school, to say that everything, all of our courses, would transfer, that says volumes.”<sup>157</sup> In spite of the enormity of the effort, Henderson remarked:

The end of it was kind of a cool thing. So I was on the math curriculum committee, and we decided what the curriculum was for that entry math course, which was fun. We said well, these 20 things need to be in the course and these are the 20 things that we all think need to be in the course, but not all of us think it’s the same 20, so we agreed on 10 that were required and then the other 10...you could pick and choose [from] a laundry list, which was really nice, and then we all agreed that as mathematicians that...if one school would transfer, it would transfer over.<sup>158</sup>

Dr. David Morgan was Assistant Vice Chancellor for Academic Affairs and was responsible for the work of the numerous systemwide faculty committees responsible for revising the curriculum. Jim Muyskens said, “You needed people who could keep the trains moving on time, and that’s what David Morgan did.”<sup>159</sup> With regard to the updated

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<sup>155</sup> Muyskens, interview.

<sup>156</sup> Henderson, interview.

<sup>157</sup> Ibid.

<sup>158</sup> Ibid.

<sup>159</sup> Muyskens, interview.

core, Dr. Morgan stated, “I think institutions by and large were satisfied with the changes.”<sup>160</sup>

In the final analysis, semester conversion had three primary benefits. First, it put the system on a uniform academic calendar.<sup>161</sup> Second, it updated the curriculum across the system. Finally, it made the core curriculum transferable from any system institution to any other system institution.<sup>162</sup> Despite these successes, Portch felt the initiative did not achieve its full potential with regard to curricular innovation. He remarked, “I think in all candor, the disappointment in that totally understandable outcome was that some of the most innovative things I had hoped to see occur out of that initiative didn’t really materialize because people were under such a tremendous press to get it done. It was such a tremendous amount of work that just to get the basics done consumed most of the energy.”<sup>163</sup>

### *Pre-School-College (P-16) Policy Directive*

In March 1995, the Board approved the Pre-School-College (P-16) Policy Directive, which was linked to principles 1, 4, 8, 11, and 29. The overarching objective of the P-16 initiative was to address the need for co-reform within Georgia’s public education systems to create a seamless transition between all levels of public education from prekindergarten through college. More specific goals were to improve student

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<sup>160</sup> Morgan, interview.

<sup>161</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia, May 12 and 13, 1998, University System of Georgia, <http://www.usg.edu/regents/minutes/1998/may98.phtml>. (accessed May 21, 2008).

<sup>162</sup> Ibid.

<sup>163</sup> Portch, first interview.

achievement through cross-sector changes in the three public educational systems, help students move smoothly from one educational sector to another, ensure preparation for and success in postsecondary education, improve postsecondary admission and success rates of minority and low-income students, and link teacher education, the public schools, and communities in educational reform.<sup>164</sup> Portch wanted to raise the educational aspirations of Georgians, but he understood that raising college admissions standards would not be enough to address the state's low educational attainment levels, in particular the state's disproportionate high school dropout rates.<sup>165</sup> To raise its admissions standards, the University System of Georgia would need to collaborate closely with its fellow educational agencies, the Department of Education (DOE) and the Department of Technical and Adult Education (DTAE). Governor Miller recounted:

It was something Portch felt was overdue in our state. He wanted the stamp of approval of the Governor, and I liked the idea. He did something that had not been done before, which was a chancellor reaching out to the two other key education leaders in state government – the state school superintendent and the DTAE commissioner. There's always a sense of rivalry among these agencies. They watch who's getting what kind of funding and often point it out to the governor and the legislature, if one agency seems to be 'getting more.' Portch in a real stroke of leadership broke that mold and sent a strong signal that the regents understood we're all partners. That's what I remember – his leadership to break down those barriers.<sup>166</sup>

Portch stated, "I knew theoretically what I wanted to do. I knew why it had to be done. I knew we needed something like that, but you know, Jan [Kettlewell] gave it shape."<sup>167</sup>

Dr. Janet S. Kettlewell was Dean of the College of Education at Miami University in Ohio when her fiancé, Dr. Ronald J. Henry, took the position of Provost and Vice

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<sup>164</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia Held at East Georgia College, Swainsboro, Georgia, October 8 and 9, 1996, <http://www.usg.edu/regents/minutes/1996/oct96.phtml> (accessed May 21, 2008) .

<sup>165</sup> Portch, first interview.

<sup>166</sup> Miller, letter.

<sup>167</sup> Portch, first interview.



President for Academic Affairs at Georgia State University in summer 1994.<sup>168</sup> Knowing that Kettlewell wanted to move to Georgia to join Henry and that Portch had an interest in developing educational partnerships, GSU's President Carl V. Patton introduced them.<sup>169</sup> "I don't know when Jan came exactly, but again, fate played a significant hand," said Portch. "A woman walks in off the street looking for a job [laughs], and it could not have been a better moment for Jan to have shown up in the state with her background, drive, energy, and vision. So again, we got lucky because we got someone who really put meaning to yet another notion."<sup>170</sup>

Kettlewell began working in the system office in an interim capacity without a clearly defined job description in December 1994.<sup>171</sup> She offered to write a white paper on what she envisioned for the P-16 initiative. "And in that white paper, I described P-16, what it would look like, the scope of the agenda, sort of the two big buckets of work – one being promoting on the student side the successful transitions of students through the various levels of education from high school and into and through college, and then on the teacher side, preparation and continued development of teachers from the university back to the schools."<sup>172</sup> Portch asked her to convert the white paper into a policy directive. After the directive was approved by the Board in March 1995, Kettlewell urged the chancellor to visit the governor and ask him to create a statewide P-16 council.<sup>173</sup>

In July 1995, Kettlewell became Assistant Vice Chancellor for Academic Affairs with responsibility for the P-16 initiative, and Governor Miller appointed a statewide P-

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<sup>168</sup> Janet Kettlewell, interview by author, Atlanta, GA, August 21, 2007.

<sup>169</sup> Ibid.

<sup>170</sup> Portch, first interview.

<sup>171</sup> Kettlewell, interview.

<sup>172</sup> Ibid.

<sup>173</sup> Ibid.

16 Council, which held its inaugural meeting on July 26, 1995.<sup>174</sup> “Our whole education process must become both stronger and more seamless,” Miller said at the swearing-in ceremony of the new commission. “And the only way that can happen is if our schools, colleges and technical institutes work together.”<sup>175</sup> The P-16 Council involved 38 people from across the state, including college presidents, business and community service leaders, legislators, teachers, and students.<sup>176</sup> “My great hope for this council is that all three public education systems and the business community will come together and build upon their existing partnerships to create educational reform, which will ultimately improve student learning,” the governor is quoted as saying.<sup>177</sup> He subsequently provided more than \$1 million in state funds for the council’s work, which helped generate more than \$7 million in funds from the private sector during his governorship.<sup>178</sup> By the end of the first year of the P-16 initiative, there were 15 local P-16 Councils in addition to the statewide council. Participants in the councils included 29 of the 34 system institutions, 147 school districts, 23 DTAE institutes, 23 private schools, 80 businesses, and 41 other agencies.<sup>179</sup>

In fiscal year 1998, the full board in its capacity as the strategic planning committee embarked on the first of a series of yearlong in-depth studies of specific initiatives related to the strategic plan. The teacher preparation initiative was one of the two “buckets of work” Kettlewell had described in her original white paper, and she chose it as the primary focus of the P-16 initiative because it was the piece of the

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<sup>174</sup> Reagan Walker, “‘P-16’ Council Hopes to Make State’s Education A-1,” *The Atlanta Constitution* (July 27, 1995), C8.

<sup>175</sup> Ibid.

<sup>176</sup> Ibid.

<sup>177</sup> Eby-Ebersol, 170.

<sup>178</sup> Ibid.

<sup>179</sup> Minutes, October 1996.

initiative over which the board had most control.<sup>180</sup> “He is visionary, absolutely visionary in terms of how he was able to bring that,” said Kettlewell of Portch’s ability to engage the regents for an entire year on this one central piece of the P-16 initiative.<sup>181</sup> In October 1997, Portch introduced the teacher preparation initiative with a cautionary note to the regents that they alone could not solve all of the ills of teacher preparation, but that they would in the coming year attempt to develop some innovative ways to improve teacher education in the University System of Georgia.<sup>182</sup> The first of several meetings of the yearlong study focused on the system’s existing teacher education practices, programs, and challenges, specifically the demographics of Georgia teachers, how they were prepared for certification and obtained their licensure, and what happened to them once they graduated and entered the teaching profession.

In the course of the teacher preparation initiative, teacher education would become the shared responsibility of education faculty, arts and sciences faculty, and classroom teachers in the schools. To reflect this collaborative model, Kettlewell established a teacher preparation taskforce to work with the system office in developing some principles for teacher preparation. The taskforce included system presidents, vice presidents, and deans; the executive secretary of the Professional Standards Commission; the deputy state superintendent of schools; as well as P-12 principals and teachers.<sup>183</sup> The Chancellor also hired two Master Teachers in Residence to represent classroom teachers on the taskforce.<sup>184</sup>

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<sup>180</sup> Kettlewell, interview.

<sup>181</sup> Ibid.

<sup>182</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia Held at Clayton College & State University, Morrow, Georgia, October 7 and 8, 1997, <http://www.usg.edu/regents/minutes/1997/oct97.phtml> (accessed May 21, 2008).

<sup>183</sup> Minutes, December 1997.

<sup>184</sup> Ibid.

At the March 1998 board meeting, Kettlewell presented the first reading of proposed principles on teacher preparation to the regents and their special guests, Chair of the State Board of Education Johnny Isakson and State Superintendent of Schools Linda Schrenko, with an invitation for all of them to help fine-tune the final principles, which would be presented for board action in April.<sup>185</sup> There were nine recommended principles grouped into three categories: quality assurance, collaboration, and responsiveness.<sup>186</sup> The principles emphasized two things: the knowledge and skills that educators need to teach and administrate effectively and the assurance that graduates of system institutions can teach what they know in positive ways to children before they receive recommendation for certification.<sup>187</sup> Previously, teacher education in the University System of Georgia focused primarily on what courses and field experience teacher candidates were required to have. The proposed principles addressed not only what a teacher candidate should know and be able to do, but also on what the children would learn as a result of what the teacher candidate knows and can do.<sup>188</sup> The principles in general would require stronger academic requirements, a full year of field experiences (double what the requirement had been), and more performance-based measures. They also would eliminate general education courses and would change the governance of education programs to the afore-mentioned shared responsibility of education faculty, arts and sciences faculty, and classroom teachers in the schools.<sup>189</sup>

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<sup>185</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia Held at 270 Washington Street, S.W., Atlanta, Georgia, March 10 and 11, 1998, <http://www.usg.edu/regents/minutes/1998/mar98.phtml> (accessed May 21, 2008).

<sup>186</sup> Ibid.

<sup>187</sup> Ibid.

<sup>188</sup> Ibid.

<sup>189</sup> Ibid.

Following the presentation on the proposed principles, the regents engaged in a lengthy and lively discussion with Kettlewell, Portch, Isakson, and Schrenko, thoroughly explicating the principles one at a time. Isakson and Schrenko expressed their support for stronger content preparation and field experiences. In his remarks, Isakson thanked the chancellor for the great communication efforts he had made throughout the course of this initiative.<sup>190</sup> He said that just as the “University System guarantee” aimed to keep teacher candidates from entering the classroom unprepared, he and Schrenko aspired to guarantee to the board that every graduate of a college preparatory curriculum would enter the University System of Georgia without need of remediation.<sup>191</sup> Most importantly, Isakson recommended that a tenth guiding principle be added that every teacher graduated in early childhood development or elementary or primary education be taught to teach children to read without regard to prejudice of theory or philosophy.<sup>192</sup> He explained that, with regard to theory, one size does not fit all. Teachers must be prepared to teach the methods that work for individual children.<sup>193</sup>

In April 1998, the strategic planning committee as a committee of the whole heard a presentation by Dr. John I. Goodlad, Professor Emeritus of Education and Codirector of the Center for Education Renewal at the University of Washington in Seattle. Goodlad gave the board a national perspective on the field of teacher education and discussed extensively the conditions that must be put in place to realize the full potential of the board’s proposed teacher preparation principles.<sup>194</sup> Following Goodlad’s presentation and

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<sup>190</sup> Ibid.

<sup>191</sup> Ibid.

<sup>192</sup> Ibid.

<sup>193</sup> Ibid.

<sup>194</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia Held at Albany State University and Darton College, Albany, Georgia, April 1998, <http://www.usg.edu/regents/minutes/1998/apr98.phtml> (accessed May 21, 2008).

discussion, the board approved a revised set of now ten “Principles for the Preparation of Educators for the Schools.”<sup>195</sup> In response to Isakson’s concerns and the concerns expressed by some regents, the tenth principle was a guarantee that all graduates of system early childhood programs would be able to demonstrate accomplishment in teaching children to read and do mathematics.<sup>196</sup> The final approved Principles for the Preparation of Educators for the Schools were as follows:

1. The University System will guarantee the quality of any teacher it graduates. The university that awarded the degree and/or submitted the recommendation for teacher certification will assure that its graduates:
  - have sufficient subject matter knowledge in all areas included on their teaching certificates.
  - can demonstrate success in bringing students from diverse cultural, ethnic, international, and socio-economic groups to high levels of learning.
  - are able to use telecommunication and information technologies as tools for learning.
2. The University System will guarantee that all of its graduates in early childhood education can demonstrate accomplishment in teaching children to read and to do mathematics.
3. Graduate programs for teachers will adhere to the general principles of the National Board for Professional Teaching Standards.
4. The University System will assure that graduates of its programs for school leaders and counselors are able to create learning environments that support teacher success in bringing students from diverse groups to high levels of learning.
5. Teacher preparation programs will be the shared responsibility of education faculty, arts and sciences faculty, and classroom teachers in the schools.
6. Through partnerships with P-12 schools, universities that prepare teachers will have an ongoing responsibility to collaborate with schools in mentoring, induction, and professional development programs for classroom teachers and school leaders.

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<sup>195</sup> Ibid.

<sup>196</sup> Ibid.

7. All teacher preparation programs will implement aggressive recruitment policies to increase the numbers, to raise the caliber, and to expand the diversity of teacher candidates, and to balance supply and demand.
8. The University System will expand the number of teacher certification programs offered to individuals who already hold bachelors' degrees from accredited colleges in order to increase opportunities for individuals seeking second careers in teaching.
9. The University System will work with the Department of Education and the Professional Standards Commission to bring an end to out-of-field teaching in Georgia.
10. The University System will encourage institutions that prepare teachers to give added emphasis to policies that:
  - support the efforts of faculty to model effective teaching.
  - support the efforts of faculty to focus their research on ways to improve classroom teaching and student learning within P-12 schools.
  - support increased participation of teacher preparation faculty in the public schools.<sup>197</sup>

Perhaps the most important of these principles was the first, which Kettlewell described as the “University System guarantee.”<sup>198</sup> The guarantee obligated the university system to take back any teacher within the first two years after graduation whose school district found less than effective in promoting student progress. If the district did send the teacher back, further training would be provided at no cost to the student or the district.<sup>199</sup> According to Kettlewell, no teachers have ever returned to the University System of Georgia under the “University System guarantee.”<sup>200</sup> Moreover, the Office of P-16 Initiatives has used limited state resources to leverage millions of dollars in private funding in an effort to improve education in the State of Georgia from pre-kindergarten to college. However, perhaps the more important achievement of the P-16 initiative and the teacher preparation initiative in particular is that they opened communication between

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<sup>197</sup> Ibid.

<sup>198</sup> Ibid.

<sup>199</sup> Ibid.

<sup>200</sup> Kettlewell, interview.

educational agencies that would facilitate the collaboration necessary to implement the Policy Direction on Admissions. President Lord was among many interview participants who cited P-16 as one of the greatest successes of the strategic plan. She said, “The reason I feel so strongly about P-16 is because in Georgia, K-12 was another silo, much like DTAE, and by encouraging cross-sector collaboration, what that did was provide a vehicle for the colleges who were willing to do it to step forward and establish a clear, open communication path with K-12 partners in your area.”<sup>201</sup> However, Portch noted, “I have done a lot of speeches on P-16, and I said, if I had my druthers, we wouldn’t have driven P-16, it would have been an equal partnership, or it would have been someone else’s idea, but it wouldn’t have happened if we hadn’t driven it.”<sup>202</sup>

### *Policy Direction on Admissions*

At the May 1995 Board of Regents meeting, Portch introduced the Policy Direction on Admissions, which he considered to be the cornerstone of the strategic plan.<sup>203</sup> Tied to principles 1-5 and 29, the goals of this policy directive were numerous and ambitious, and it would probably be the most complicated piece of the strategic plan to implement. The overarching purpose of the directive was to raise the bar for admissions across the system but differentially articulated for the various sectors, as defined by the mission review initiative. Prior to this initiative, the minimum admissions requirements for all institutions in the system were a high school diploma or general equivalency diploma (GED) plus either 250 verbal SAT or 280 mathematics SAT or a 1.8

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<sup>201</sup> Lord, interview.

<sup>202</sup> Portch, first interview.

<sup>203</sup> Minutes, 1994-1995, 290; Portch, first interview.



high school grade point average (GPA).<sup>204</sup> The systemwide minimum requirements for admission without screening for developmental studies placement were 350 verbal and 350 mathematics SAT scores plus completion of the College Preparatory Curriculum (CPC) in English and mathematics.<sup>205</sup> The Policy Direction on Admissions characterized the existing minimum admissions requirements as “low” and “permissive,” respectively, noting also that institutions were allowed to admit any number of students with CPC “deficiencies” in spite of the fact that board policy defined the CPC as “essential” preparation for college-level studies.<sup>206</sup> At the time, approximately 20% of the system’s incoming freshmen started college lacking the required high school courses.<sup>207</sup> In fall 1994, 43% of freshmen entering system institutions needed remediation, costing the state approximately \$25.6 million.<sup>208</sup>

As stated in the section on mission review, part of the intent of the admissions directive was to direct students requiring remediation to two-year colleges rather than having remediation spread across all sectors of the system. Moreover, the system’s graduation rate was declining, and in many cases, institutional missions were not driving admissions policies.<sup>209</sup> Prior to the admissions initiative, there were two-year colleges with admissions standards that were higher than at some universities.<sup>210</sup> The admission directive proposal recognized the need to change the pattern of low expectations among

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<sup>204</sup> Policy Direction on Admissions, Adopted by the Board of Regents, June 14, 1995. (A copy of this document is in the author’s possession.)

<sup>205</sup> Ibid. (Note, the CPC requirements applied to students graduating from high school after 1988.)

<sup>206</sup> Ibid.

<sup>207</sup> “Preparing Students for College,” *The Atlanta Journal-Constitution* (March 15, 1995), A10.

<sup>208</sup> James Salzer, “Regents Delay Vote on Higher Standards,” *The Augusta Chronicle* (May 11, 1995), 6C.

<sup>209</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia Held at 270 Washington Street, S.W., Atlanta, Georgia, January 9 and 10, 2001, <http://www.usg.edu/regents/minutes/2001/jan01.phtml> (accessed May 21, 2008).

<sup>210</sup> Hudson, interview. Minutes of the Meeting of the Board of Regents of the University System of Georgia Held at 270 Washington Street, S.W., Atlanta, Georgia, October 12 and 13, 1999, <http://www.usg.edu/regents/minutes/1999/oct99.phtml> (accessed May 21, 2008).

students and the high need for remedial classes among college freshmen. Cathie Hudson remarked, “Portch believed... that if we raised standards, people would meet those standards, and I don’t think that philosophy had ever been publicly promoted.”<sup>211</sup>

During the May 1995 meeting, then President Edwin G. Spier and Associate Vice President for Admissions and Records Larry Peevy of Georgia College, a four-year institution, made a presentation on the college’s CPC requirements for entering freshmen. Georgia College had already implemented a CPC-based admissions policy in 1992 and was therefore seen as a model institution for the proposed admissions standards.<sup>212</sup> Peevy presented data documenting the advantages of a CPC in high school for college-bound students noting that “the success rates for both males and females of all races are much improved in college if they have completed all of the CPC before entering college.”<sup>213</sup> He stated that students with deficiencies in the CPC “could benefit from enrolling in two-year colleges where developmental studies are available to prepare them for entrance into four-year institutions.”<sup>214</sup> He further stated that Georgia College’s CPC-based admissions requirements had produced continuous improvement in retention and graduation at the college.<sup>215</sup> Moreover, the average combined SAT score of Georgia College’s incoming freshmen rose 50 points in three years.<sup>216</sup>

There is no record of the regents’ discussion of the proposed Policy Direction on Admissions at the May 1995 meeting except to state that after “further discussion of the admissions proposal and of the other items,” the Committee adjourned, and when it

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<sup>211</sup> Hudson, interview.

<sup>212</sup> Minutes, 1994-1995, 291.

<sup>213</sup> Ibid.

<sup>214</sup> Ibid.

<sup>215</sup> Ibid.

<sup>216</sup> Salzer, May 11, 1995.

reconvened, “The Board deferred voting on this item until the next regular meeting.”<sup>217</sup>

According to an article in *The Atlanta Journal-Constitution*, the discussion of admissions had been preempted by a long executive session on unrelated matters.<sup>218</sup> The article

quoted Regent McMillan as saying, “I’m not against the policy. It is long overdue.”<sup>219</sup>

However, it noted, “McMillan said a key concern is cutting off access to college for minority students who are not given equal opportunity in elementary and high school.”<sup>220</sup>

*The Augusta Chronicle* reported that McMillan had concerns that black students had been diverted from taking the CPC and that he was concerned that raising admissions

standards across the system would limit access to students who had historically not been given equal opportunity in K-12 schools. “There is a pernicious practice that’s pervasive

in our country,” McMillan was quoted as saying. “It’s not just a regents’ problem, it’s a systemic problem. At the heart of this are system and political and social problems we

have to tackle head on.”<sup>221</sup>

In fact, Regent McMillan’s concerns were the reason the board deferred voting on the Policy Direction on Admissions. At the time, McMillan was the first African-American executive director of the Southern Education Foundation, one of the nation’s oldest foundations created by the 1937 merger of the Peabody Education Fund, the John F. Slater Fund, the Jeanes Fund, and the Virginia Randolph Fund.<sup>222</sup> The second African-American appointed to the Board of Regents and the first to serve as its chair, he was considered to be the “quiet conscience” of the board. Although the minutes do not reflect

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<sup>217</sup> Ibid.

<sup>218</sup> Reagan Walker, “Regents Table Admissions Issue,” *The Atlanta Journal-Constitution* (May 1, 1995), C3.

<sup>219</sup> Ibid.

<sup>220</sup> Ibid.

<sup>221</sup> Salzer, May 11, 1995.

<sup>222</sup> Southern Education Foundation, History/Timeline, <http://www.sefatl.org/historylist.asp> (accessed July 21, 2008).

any discussion of the matter, in his interview, McMillan gave me a copy of a letter he sent to Chancellor Portch dated May 9, 1995, the first day of the two-day board meeting.<sup>223</sup> In the letter, McMillan wrote, “I support emphatically the position that there needs to be a new policy direction on admissions; possibly, the proposed policy which you proffer just might fit the bill; it is far reaching; and it is comprehensive.”<sup>224</sup> However, Regent McMillan cautioned, “From my perspective, what this policy would do, wittingly or unwittingly, if not tempered, is to toll the academic death-knell for large numbers of youngsters in this State.”<sup>225</sup> McMillan’s letter highlighted several concerns and questions he had regarding the admissions policy direction, and he also shared with me his copy of the original policy direction proposal in which margins he had noted for the chancellor all of his concerns. He said, “I felt the proposal, the guidelines as they had been presented, did not take cognizance of certain inequities that had gone on that were historic inequities in the lives of black students, students from rural areas, or students from school systems in places where their level of preparation was not up to snuff. In other words, I was terribly concerned that the victims of bad educational practices in the past... would not have to bear the burden of their inequities... and their inequities that they had been faced with in the bad situations from which they had come.”<sup>226</sup> McMillan explained, “And so my point was there needed to be a longer period of time before all of these new policies were put into play, but during that period of time, there should be some discreet efforts in

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<sup>223</sup> McMillan stated that Regent Anderson also wrote a letter expressing similar sentiments, but I did not interview Anderson, nor did I obtain a copy of the letter.

<sup>224</sup> Memorandum from Elridge W. McMillan to Dr. Stephen R. Portch, Board of Regents of the University System of Georgia regarding Proposed Policy Direction on Admissions, May 9, 1995. (This item is in the personal files of Regent McMillan. A copy of this document is in the author’s possession.)

<sup>225</sup> Ibid.

<sup>226</sup> McMillan, interview.

place that would help – you know, the old cliché – level the playing field. It won't be level, but at least it might be less rocky.”<sup>227</sup>

It was customary for Portch and his staff to thoroughly vet the policy directives with regents and presidents prior to their official presentation to the board so that such concerns were assuaged prior to the public meeting. How was it then that this directive was so publicly questioned? Dunning offered this hypothesis:

Regent McMillan had, from his perspective, been the conscience of the board around these issues since his appointment.... So you see what has driven his values development is to have access and improve education in the South while representing groups, underprivileged groups. I think he viewed his time on the board... to be a voice for that and to be vigilant about it. I think even he had been satisfied prior to the meeting, [but] he had an ethical responsibility to speak fully to the board before they made gatekeeper decisions. Even if he had had a meeting with me and Sid and Steve, to say he felt publicly it was his lot in life, given his chosen profession, given his view of Southern access, he was duty-bound to say something about that.<sup>228</sup>

Weber recalled that Portch was surprised by McMillan's public remonstration. She stated, “[Portch's] almost exclusive experience in higher education was Wisconsin, where they didn't, where they still don't have the minorities. I think they have pockets of poverty, but the rural situation is not anything like it is here.... He kept saying, ‘If we raise the level, I have every confidence that a student can jump there and meet it.’ So, I think he was taken aback a little bit.”<sup>229</sup> Bremer, who drafted the policy directive, recalled, “I mean, it wasn't that Steve and I were insensitive [as non-Southerners] to the racial ramifications of admissions and retention and remediation, but that we probably

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<sup>227</sup> Ibid.

<sup>228</sup> Dunning, interview.

<sup>229</sup> Weber, interview.

didn't know how deep they went."<sup>230</sup> The statement by Bremer is a reminder that the legacy of race in Georgia is enduring.

"This is where you know the chancellor knew who his bosses were, and he knew when Elridge McMillan spoke, you listened," said Weber. "Immediately, that brilliant, creative mind went together with Elridge's, and we'd come up with PREP."<sup>231</sup> PREP was the Post-secondary Readiness Enrichment Program, which Portch would develop to address McMillan's concerns about access. "Steve had a creative mind," said Dunning. "So many things, you see, stem from those sorts of energized encounters, encounters with him and with other regents who spoke about some of these things."<sup>232</sup> The genesis of PREP was imbedded in the P-16 initiative, but it had not yet been developed nor had funding been secured. This incident would accelerate the development of the concept, and it would force the issue of funding. "My point about the money thing was that if we believe strongly enough that that's important, we need to come to the table with some of our own funds," explained Regent McMillan. "That was one of my concerns. There was no indication in the original document that the board was going to come up with any funds to help put into place some of these kinds of things that needed to be, and my point there was that, if it's important enough for us to have it in here, then it ought to be important enough... for us to come to the table with some funds."<sup>233</sup>

Of Chancellor Portch's response to the situation, Regent Baranco recounted:

He is not beyond compromise. When we had our toughest battle, Stephen and I, I was put in between Stephen Portch and Elridge McMillan on the issue of raising the standards, Elridge McMillan coming from the school and representing old school African-Americans, Stephen Portch coming from new school – if we're

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<sup>230</sup> Bremer, interview.

<sup>231</sup> Weber, interview.

<sup>232</sup> Dunning, interview.

<sup>233</sup> McMillan, interview.

ever going to improve situations for African-Americans, for everybody, you have to raise the standards in Georgia. That means African-Americans need to be brought along too. And I was dead in the middle because I had to be the voice of reason. I was the chair.... I said that I will not accept any policy that has as its basis or as its foundation a presumption that African-Americans cannot perform at the highest level.<sup>234</sup>

Portch remarked, “I think it’s a classic example of how a board member and a board can add value. Slowing us down on this one ended up with a much better policy, with a much better process, and with the birth of something (PREP) which became very significant.”<sup>235</sup> In fact, going forward, Portch would effectively marry the P-16 and PREP initiatives with the admissions directive. He adopted a mantra: “Access without a reasonable chance of success is perpetuating a fraud on students.”<sup>236</sup>

By the time of the June meeting, Bremer had revised the admissions policy directive to McMillan’s satisfaction and the board voted unanimously to adopt it.<sup>237</sup> McMillan recalled, “I was stunned in a sense because nearly every one of the issues that I had suggested or articulated as having concerns about had been addressed and, in many instances, went beyond my wildest expectations.”<sup>238</sup> Following the adoption of the Policy Direction on Admissions, Portch appointed a taskforce to develop the new systemwide admissions policy. Dr. Henry, GSU’s Provost would co-chair the taskforce with Dr. George N. Williams, Professor of Chemistry at Savannah State University.<sup>239</sup> Henry stated, “What [Portch] was interested in doing was attempting to get some necessary

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<sup>234</sup> Baranco, interview.

<sup>235</sup> Portch, first interview.

<sup>236</sup> Ibid.

<sup>237</sup> Minutes, 1994-1995, 326.

<sup>238</sup> McMillan, interview.

<sup>239</sup> Access to Academic Excellence: University System of Georgia Strategic Planning Documents. (This notebook containing all of the strategic directive documents is on file with the University System Office. A copy of this notebook is in the author’s possession.)

simplicity into the system.”<sup>240</sup> The 23-member taskforce included numerous system faculty members and administrators, one high school counselor, two system students, and the executive director of the Southern Association of Independent Schools.<sup>241</sup> Cathie Hudson represented the system office on the taskforce and would be largely responsible for monitoring the implementation of the initiative. Of the committee work, Henry recalled, “We probably met roughly monthly. The chancellor was good. He set a fairly short timeline, so we were able to accomplish the work in probably about four to five months.... After the committee, [the recommendations] would have to go to the presidents and of course the staff at the regents’ level to massage the recommendations as well.”<sup>242</sup>

Portch himself had to work hard to sell the idea of raising the admissions standards. “I would say [the admissions initiative] was... probably the thorniest whole issue he had to deal with, and he did a lot of work on that himself,” stated Sharon James.<sup>243</sup> Many interviewees expressed sentiments similar to that of Art Dunning, who said, “There was a lot of gnashing of teeth and wailing about [raising admissions standards] because, I call it, a conspiracy of low expectations.”<sup>244</sup> James recalled that Portch did “a lot of going out and talking to people and meeting with people and trying to get buy-in... and talking about how you might really implement this and what kind of flexibility there would be. I think people were so afraid that it would just be this draconian thing and everybody would have to do exactly the same thing, and that wasn’t

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<sup>240</sup> Ronald Henry, interview by author, Atlanta, GA, July 20, 2007.

<sup>241</sup> Ibid.

<sup>242</sup> Ibid.

<sup>243</sup> James, interview.

<sup>244</sup> Dunning, interview.



the intention, and I don't think that's how it ended up.”<sup>245</sup> In an article in *Black Issues in Higher Education*, Regent Baranco was quoted as saying, “I think we may have some initial backlash, but I refuse to accept any kind of assumption, presumption, or any kind of policy making that has as its base the assumption that black Americans cannot perform at peak level. I absolutely refuse to accept that.”<sup>246</sup>

At the May 1996 board meeting, the regents had their first reading of the proposed new admissions standards. In teeing up the presentation, Portch reminded the board that the title of its strategic plan was “Access to Academic Excellence” and that its approach was bilateral.<sup>247</sup> The admissions policy would raise the bar, while the system would provide mechanisms to assist those who needed help to reach that higher bar.<sup>248</sup> “It’s not just about excellence. It’s about making sure students can access excellence,” Portch was quoted as saying in *The Augusta Chronicle* at the time. “We know now students will achieve less if we require less. We’re raising the bar as high as we can, but we also need to coach our students to reach that bar.”<sup>249</sup> He noted that the admissions standards were being phased in over five years in order to give the university system time to work with the P-12 system to help students meet the new admissions standards. He noted that both the superintendent of DOE and the commissioner of DTAE were in agreement with the approach to raising the standards and that Superintendent Linda Schrenko had offered to co-fund the communications effort that would be critical to the

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<sup>245</sup> James, interview.

<sup>246</sup> “Georgia’s HOPE: A System in Transition,” *Black Issues in Higher Education* (September 19, 1996), vol 13, no 15, 10-14.

<sup>247</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia Held at 244 Washington St., S.W., Atlanta, Georgia, May 7 and 8, 1996, <http://www.usg.edu/regents/minutes/1996/may96.phtml> (accessed May 21, 2008).

<sup>248</sup> Portch, first interview.

<sup>249</sup> Salzer, May 11, 1995.

success of the initiative.<sup>250</sup> Portch stressed that the point of the initiative was to improve student success in college.<sup>251</sup>

Henry presented the proposed admissions standards to the board. For traditional freshmen, there would be two key changes. The first proposed change was an increase in the number of CPC requirements to add an additional mathematics course, encouraging students to take mathematics in their senior year of high school. Portch noted at the meeting that a College Board study had found that mathematics preparation in high school was an important predictor for success in college.<sup>252</sup> Henry added that another national study indicated that better mathematics preparation helped level the playing field between genders and among racial backgrounds.<sup>253</sup> He reported that the DOE had changed its graduation requirements such that by 2000, students graduating with a college preparatory diploma would have CPC requirements closely aligned with the system's new admissions standards.<sup>254</sup> The new CPC requirements were differentiated by the institutional sectors such that for regular admission to a system two-year college, an entering traditional freshman would need a minimum of 16 CPC units. However, at the regional or state university level, a student would need two additional units (18 total), and at the research university level, a student would need an additional four units (20 total).

The 16 minimum required CPC courses were as follows:

- a. MATHEMATICS: 4 college preparatory Carnegie units, including Algebra I, Algebra II, and Geometry

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<sup>250</sup> Minutes, May 1996.

<sup>251</sup> Ibid.

<sup>252</sup> Ibid.

<sup>253</sup> Ibid.

<sup>254</sup> Ibid.

- b. ENGLISH: 4 college preparatory Carnegie units which have as their emphasis grammar and usage, literature (American, English, World), and advanced composition skills
- c. SCIENCE: 3 college preparatory Carnegie units, with at least one laboratory course from the life sciences and one laboratory course from the physical sciences
- d. SOCIAL SCIENCE: 3 college preparatory Carnegie units, with at least one course focusing on United States studies and one course focusing on world studies
- e. FOREIGN LANGUAGE: 2 college preparatory Carnegie units in the same foreign language emphasizing speaking, listening, reading, and writing<sup>255</sup>

The second proposed change was the establishment of a “freshman index” (FI).

The freshman index was a combination of a student’s SAT score and high school GPA with a slightly greater weight placed on the GPA. Henry explained that a combination of GPA and SAT scores were a better predictor of college success than either one alone.<sup>256</sup>

The freshman index formula would be as follows:

$FI = 500 \times (\text{high school GPA}) + \text{SAT Verbal/Critical Reading} + \text{SAT I Math}$ , or

$FI = 500 \times (\text{high school GPA}) + (\text{ACT Composite} \times 42) + 88$ <sup>257</sup>

With a maximum possible freshman index score of 3600, the minimum score required for admission to a research university would be 2500; for a regional university, 2040; for a state university, 1940; and for a state or two-year college, 1830.<sup>258</sup> In addition to the freshman index requirements, students would have to have a minimum verbal score of 430 and a minimum mathematics score of 400 on the SAT to be admitted to a four-year institution.<sup>259</sup> Students with lower scores of at least 330 verbal and 310 mathematics

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<sup>255</sup> Policy Manual of the Board of Regents of the University System of Georgia, Section 402.0101, Freshman Requirements. <http://www.usg.edu/regents/policymanual/400.phtml>. Verified against archival policy manuals available at the University System Office. Hereafter cited as “Policy Manual.”

<sup>256</sup> Minutes, May 1996.

<sup>257</sup> Policy Manual .

<sup>258</sup> Ibid.

<sup>259</sup> Ibid.

could be admitted to two-year colleges but would have to take or be exempted from developmental studies.<sup>260</sup> Depending on how well they performed on the freshman index, students would be sorted into a pool to be considered for admission into a particular sector of institution. David Morgan considered the freshman index to be a somewhat “esoteric approach to admissions” that was perhaps too complicated for many Georgians to understand.<sup>261</sup> Henry asserted that the freshman index helped to level the playing field. “When I looked at the ethnicity of the students by different cutoff scores for the freshman index... it was the same percentage of black to white in all of those, so to me, there wasn’t going to be disparity in kind on minorities,” he said. “We had offline conversations with Regent McMillan based on that sort of information because it wouldn’t have been good for the system if we had a huge disparate impact.”<sup>262</sup>

An intended effect of the new standards was that traditional freshmen who did not have the CPC background or who required remediation would no longer be admitted to research, regional, or state universities. Instead, those who needed remediation would be admitted to the two-year college sector. Therefore, two-year colleges would become the new “points of access” to the system, consistent with their sector mission. However, this approach had built-in mobility. The now standardized core curriculum was intended to ensure that two-year college students had the appropriate background to transfer into a four-year institution. The strategy was to help students who were not ready for a four-year institution straight out of high school prepare at the two-year college level to transfer without loss of credit. The ultimate goal was to reduce the number of students who must

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<sup>260</sup> Ibid.

<sup>261</sup> Morgan, interview.

<sup>262</sup> Henry, interview.

take developmental studies by 5% per year while simultaneously raising the SAT scores and requirements across the system and maintaining a diverse student population.<sup>263</sup>

Moreover, the admissions process was not simply a formula, it was also a matter of professional discretion. To provide some level of flexibility to the institutions, the taskforce recommended that they be permitted to set higher admissions standards and that they also be permitted to allow a small percentage of “limited admissions” students.<sup>264</sup> To qualify for limited admissions to any four-year institution, students would need a minimum of 16 CPC units, and for admission to a two-year institution, they would need at least 13 CPC units.<sup>265</sup> The freshman index required for limited admission to a research university would be 2020; to a regional university, 1830; and to a state university, 1790.<sup>266</sup> The percentage of limited admissions to institutions was also differentiated by sector: 1% of total enrollment at research universities; 4% at regional universities; 10% at state universities; and 33% at two-year colleges.<sup>267</sup> The purpose of the limited admissions allowance was to give admissions professionals some leeway in allowing students to enroll who may be otherwise qualified but did not score high enough on the freshman index. Additionally, a very small number of students could be admitted as presidential exceptions “due to their unique capabilities in certain areas.”<sup>268</sup>

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<sup>263</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia Held at 244 Washington St., S.W., Atlanta, Georgia March 11 and 12, 1997, <http://www.usg.edu/regents/minutes/1997/mar97.phtml> (accessed May 21, 2008).

<sup>264</sup> Minutes, May 1996.

<sup>265</sup> Policy Manual.

<sup>266</sup> Ibid.

<sup>267</sup> Minutes, May 1996.

<sup>268</sup> Minutes, January 2001.

The taskforce further proposed that nontraditional students be exempt from taking the SAT or ACT and from meeting the CPC requirements.<sup>269</sup> Muyskens remarked, “What we did in Georgia, which I thought was really good, you required these [admissions requirements] for graduating [high school] seniors, but students, people who were older could come back under different standards, so we weren’t shutting anybody out. We wanted to make sure they could continue to have access.”<sup>270</sup> Moreover, the admissions standards for transfer students would encourage them to stay at their original institutions longer. They would be required to complete at least 30 semester hours before transferring, or they would have to meet the freshman admissions requirements of the sector in which they wanted to transfer.<sup>271</sup> Henry concluded his presentation of the proposed admissions requirements by noting that they constituted a “standards-based” approach to admissions based upon what students know and can do.<sup>272</sup>

When the board voted on the admissions recommendations in June 1996, Regent McMillan remarked that the report was one of the best he had ever read and that it was an excellent plan to raise admissions standards.<sup>273</sup> However, he cautioned that the board must ensure that the P-16 and PREP initiatives would be implemented or the admissions policies would not work.<sup>274</sup> Portch would also carry this message to the public throughout the implementation of the admissions standards. “There is no such thing as unlimited resources. We don’t have time to try to educate people who are not prepared to

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<sup>269</sup> Section 402.0103 of the Policy Manual of the Board of Regents of the University System of Georgia defined nontraditional students as students who had been out of high school for at least five years, had a high school diploma or GED, and had less than 30 transferable semester credit hours.  
<http://www.usg.edu/regents/policymanual/400.phtml>.

<sup>270</sup> Muyskens, interview.

<sup>271</sup> Minutes, May 1996.

<sup>272</sup> Ibid.

<sup>273</sup> Minutes, June 1996.

<sup>274</sup> Ibid.

come in,” he was quoted as saying in *Black Issues in Higher Education*. “And I don’t ever want to talk about raising standards without talking about P-16 and our initiative to be able to prepare people to meet those standards.”<sup>275</sup>

Concurrently with the approval of the new admissions standards and consistent with Portch’s intent to marry access with excellence, in June 1996, the system launched four pilot PREP sites at Atlanta Metropolitan College, Floyd College, Valdosta State University, and West Georgia College.<sup>276</sup> These four pilot programs would inform the establishment of a total of ten PREP sites around the state. In the year since the approval of the revised Policy Direction on Admissions, Portch had appointed a taskforce of representatives from all sectors of the system, as well as the DOE, DTAE, middle and high school principals and counselors, among others.<sup>277</sup> He had also secured \$300,000 in state funding for PREP per McMillan’s concerns, but that would be just a fraction of PREP’s funding.<sup>278</sup> With assistance from Dr. Joseph “Pete” Silver, who was responsible for the actual formation of PREP, Kettlewell wrote a grant proposal that resulted in a \$4 million award in April 1996 from the Woodruff Foundation to support the first two years of PREP.<sup>279</sup> Over the years, PREP would also receive grants from the Georgia Coordinating Council on Children and Youth, the BellSouth Foundation, the Georgia Power Foundation, the Pitulloch Foundation, the Coca-Cola Foundation, the Pew Charitable Trusts, the Bill and Melinda Gates Foundation, and many others.<sup>280</sup>

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<sup>275</sup> “Georgia’s HOPE: A System in Transition,” *Black Issues in Higher Education* 13 no. 15 (September 19, 1996): 10-14.

<sup>276</sup> Minutes, May 1996.

<sup>277</sup> Ibid.

<sup>278</sup> Reagan Walker “\$4 Million Gift to Prepare Kids for College,” *The Atlanta Constitution* (April 11, 1996), front page (home edition).

<sup>279</sup> Minutes, May 1996.

<sup>280</sup> Minutes, May 1996; Minutes of the Meeting of the Board of Regents of the University System of Georgia Held at 270 Washington St., S.W., Atlanta, Georgia, September 9 and 10, 1997.

The goals of PREP were to close the gap in college readiness for students in minority and low-income groups, to educate parents of middle and high school students how to prepare their children for college, and to increase college success for students in at-risk situations.<sup>281</sup> “Portch was very clear that there was a difference between student in at-risk situations and at-risk students,” noted Daniel.<sup>282</sup> The admissions directive had recommended that the new admissions requirements should be phased-in so that the current seventh grade class would have adequate time to prepare for them. Since the P-16 initiative would take several years to have its impact felt, it was decided that PREP would target middle school students beginning with the present seventh grade class. This cohort was considered a “transitional” group between the implementation of the P-16 initiative and the admissions policy direction. Silver estimated that there were approximately 40,000 seventh grade students in at-risk situations. While the system would have widespread marketing efforts aimed at all students in this cohort, it focused primarily on the upper one-third of this 40,000.<sup>283</sup> PREP coordinators worked with middle school teachers and counselors to select program participants with academic potential who were faced with “situational barriers” that could thwart their opportunity for a college education.<sup>284</sup> “We all certainly felt it was on the road to making a difference, and the presidents loved it,” said Weber. “They got on board, and they made a key decision. They couldn’t save everybody, and so they were going to go after the best potential students

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<http://www.usg.edu/regents/minutes/1997/sep97.phtml> (accessed September 19, 2008); Minutes, July 1998, <http://www.usg.edu/regents/minutes/1998/jul98.phtml> (accessed September 19, 2008); Information provided by the Office of P-16.

<sup>281</sup> Post-Secondary Readiness Enrichment Program (PREP): 1996-2003.

<http://www.usg.edu/p16/resources/PDFs/prep.pdf>

<sup>282</sup> Daniel, interview.

<sup>283</sup> Minutes, May 1996.

<sup>284</sup> Post-Secondary Readiness Enrichment Program (PREP): 1996-2003.



who were out of mainstream and in very poor circumstances.”<sup>285</sup> PREP would give those students year-round academic enhancement programs that included mentoring and tutoring from college students, classes taught by system and DTAE faculty, and cultural enrichment and community service opportunities.<sup>286</sup> There were also two-week summer enrichment programs on college campuses that included field trips and overnight stays.<sup>287</sup> The Georgia Business Forum also sponsored a Summer Leadership Institute for PREP high school students.<sup>288</sup> PREP also gave entire middle school classes the opportunity to spend a day on a college campus to show students what it would be like to be a college student.<sup>289</sup>

Dr. Jacqueline R. Michael would become Director of Pre-College Programs with responsibility for PREP, which would move under the auspices of the Office of P-16 Initiatives. Collaboration was essential to PREP. The first four PREP sites involved local P-16 councils, 21 middle schools, and a similar number of business and community partners who would provide monetary, technical, and human resources support as well as work laboratory experiences.<sup>290</sup> Perhaps the most critical participants in PREP aside from the students themselves were parents. Each program required that parents be involved.<sup>291</sup> “They said if a parent won’t be involved, the child cannot come. They had full parental involvement,” said Weber. “That was a whole different way of thinking here.”<sup>292</sup>

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<sup>285</sup> Weber, interview.

<sup>286</sup> Post-Secondary Readiness Enrichment Program (PREP): 1996-2003.

<sup>287</sup> Ibid.

<sup>288</sup> Ibid.

<sup>289</sup> Ibid.

<sup>290</sup> Minutes, May 1996.

<sup>291</sup> Ibid.

<sup>292</sup> Weber, interview.

Communication was also vital to the PREP initiative. In February 1997, the Board of Regents launched a statewide communications campaign aimed at bringing awareness to the increasing admissions standards. Portch stated:

As I went around the state and talked to students regarding the admissions standards, I heard several things. One, especially from African-American students, is that they are still getting tracked by race by counselors. They don't have enough access to counselors, so an additional part of the admissions policies called for a massive communications campaign. We will do statewide workshops each of the next four years for counselors and we will be talking about what our new expectations are. We will also try and design something to get more equity into the counseling process in Georgia. When we see schools that consistently send us students with college prep math courses who then fail their college math course, we will – through the P-16 [program] – go out and offer, as colleagues, to work with that curriculum and work with that teacher.<sup>293</sup>

The communications campaign was called “PREP It Up,” and it was a collaborative effort with the DOE and the HOPE Scholarship Program. Both DOE and HOPE officials provided funding to the campaign and simultaneously aligned their own academic requirements with those of the system's new admissions initiative.<sup>294</sup> Assistant Vice Chancellor for Media and Publications Arlethia Perry-Johnson worked closely with the Director of Communications and Marketing, John Millsaps, and Administrative Coordinator Kay Rawlings on the campaign, which would be a multi-year effort to raise awareness of the new admissions standards to become fully implemented in fall 2001. Among the marketing strategies were statewide news releases, television and radio public service announcements, brochures about the admissions standards and PREP initiative, videos for viewing at schools and civic groups, P-16 and PREP training workshops for admissions directors, a statewide mailing to school superintendents and principals, and a Georgia Statewide Academic and Medical System (GSAMS, a distance education

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<sup>293</sup> “Georgia's HOPE.”

<sup>294</sup> Minutes, March 1997.

network) telecast for middle school teachers, counselors, and administrators in which Portch and Schrenko would discuss the admissions initiative and answer questions.<sup>295</sup> Perry-Johnson stated, “We did all those things to make sure that the high schools knew what the new requirements and the new expectations were, and [Portch] directly involved Schrenko in all that activity.”<sup>296</sup>

In April 1998, the White House recognized PREP as a model after-school program serving students in at-risk situations.<sup>297</sup> At the October 1999 board meeting, Regent McMillan remarked that PREP was one of the best things the system had done to help students meet the new admissions standards.<sup>298</sup> Moreover, external evaluations found that 89% of students felt that PREP had helped them improve their grades and 98% of middle and high school teachers felt that participation in PREP activities had a positive effect on students’ academic achievements.<sup>299</sup> PREP was designed as a “bridge” program to help students caught in the implementation of the admissions standards, and as such, it was discontinued in 2003. While PREP served over 34,000 students in the course of its eight years, it was inadequately funded to reach the 72,000 Michael originally aspired to help.<sup>300</sup>

By the time of Portch’s final State of the System address to the board in November 2001, the new admissions policy had been fully implemented, signaling the full implementation of his strategic plan. Chancellor Portch lauded that the system had

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<sup>295</sup> Ibid.

<sup>296</sup> Perry-Johnson, interview.

<sup>297</sup> [http://www.usg.edu/usg\\_stats/annual\\_rep/1998/banner1.html](http://www.usg.edu/usg_stats/annual_rep/1998/banner1.html)

<sup>298</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia Held at Macon State College, October 12 and 13, 1999, <http://www.usg.edu/regents/minutes/1999/oct99.phtml> (accessed May 21, 2008).

<sup>299</sup> Post-Secondary Readiness Enrichment Program (PREP): 1996-2003.

<sup>300</sup> Ibid.

record enrollments and SAT scores constituting the “best and brightest class in the System’s history.”<sup>301</sup> Of the admissions directive in particular, he said:

Today, we have made it through the full implementation of our new admissions requirements. Many doubted our collective resolve to carry this critical policy through. They said we would ‘blink.’ There were pressures – no, let’s be honest, there were bullying and threats to get us to back down, to ease up. But this Board recognized that higher admissions requirements were essential if we were ever going to make real progress toward our goal of creating a more educated Georgia. You didn’t back down. I want to thank you from the bottom of my heart for your commitment to new admissions requirements. These requirements are the cornerstone of my Chancellorship.<sup>302</sup>

Portch reported to the regents that the average system SAT score in fall 2001 was 1026, a record high for Georgia that also exceeded the national average by six points.<sup>303</sup> He also reported that the system was recovering well from semester conversion. He cited that headcount enrollment was up 5.7%, compared to a national average of only 2%.<sup>304</sup> The system’s headcount enrollment was at a record high of 217,546, surpassing the previous record of 206,484 in fall 1995.<sup>305</sup> Moreover, credit hours had increased 6.5% over the previous year.<sup>306</sup> Learning support in the system had dropped from 27% in 1995 to 15% in 2001.<sup>307</sup> Additionally, the retention rate for first-time full-time freshmen had increased from 66% in 1994 to 73%.<sup>308</sup>

“To me, that has truly changed the system,” said Cathie Hudson of the admissions initiative.<sup>309</sup> However, with regard to the goal of eliminating learning support at the university level, “We didn’t completely get there, but we got a long way there.... We

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<sup>301</sup> Minutes, January 2001.

<sup>302</sup> Ibid.

<sup>303</sup> Ibid.

<sup>304</sup> Ibid.

<sup>305</sup> Ibid.

<sup>306</sup> Ibid.

<sup>307</sup> Ibid.

<sup>308</sup> Ibid.

<sup>309</sup> Hudson, interview.

were going to completely phase-out learning support except for a small percentage at each institution for traditional freshman by 2001. As we got closer and closer to that cut point, we had a number of institutions that were not moving forward. There was fear that if they implemented the higher standards, there would be fewer students,” she explained. “So there are compromises, and I think that’s something I’ve had to learn. Having an ideal and values will move us toward a goal, but you have to compromise a lot along the way to make progress.”<sup>310</sup>

Almost every participant in this study cited the admissions policy directive as one of the most successful, if not the single most successful, initiative of the board’s 1994 strategic plan, but one certainly did not. “I did not feel that raising the admissions standards across the board was the right thing to do because I felt community colleges and the two-year schools should be open enrollment,” said Representative Coleman. “Raising standards to the point where you might discourage people from ever feeling they could go to college was wrong. I still believe that.”<sup>311</sup> In contrast, President Skinner stated, “Contrary to what everybody said, while there was dramatic increase in enrollments at the technical colleges, they were better suited to handle those students’ needs, and the quicker we got out of the developmental business, the better off we were, but that was a tough fight. That was a *real* tough fight.”<sup>312</sup> President Clough said, “[Portch] did the right thing, and that was to try to raise standards.... Students who then couldn’t get into the two-year colleges went to DTAE.”<sup>313</sup>

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<sup>310</sup> Ibid.

<sup>311</sup> Coleman, interview.

<sup>312</sup> Skinner, interview.

<sup>313</sup> Clough, interview.

Politicians like Coleman, however, did not see it in the same light. Jimmie McEver, who was Student Advisory Council President during Portch's administration, recalled, "I remember at one of those appropriations committee meetings, there was a state legislator, and I can't remember who it was, but he was sort of busting the chancellor's chops because his daughter couldn't get into the University of Georgia anymore.... People can get upset about a single point issue and lose sight of the big picture." Governor Barnes stated, "[Portch] set the standard for improvement in education. It is just beginning to be seen. You still heard complaints, 'I can't get my kid into the University of Georgia.' And I am amazed at the scores that it takes to get into the University of Georgia now, but the results are, the University of Georgia is nationally known as a public university that is on the rise."<sup>314</sup>

From the perspective of a long-term system faculty member, Wagner recalled, "When I started teaching [at West Georgia College in 1975], I would have people who could have gone to college anywhere in the United States sitting next to people who were functionally illiterate.... If you could fog a mirror, you could be a West Georgia student. You didn't have to know how to read and write."<sup>315</sup> As a faculty member, he appreciated the increased admissions standards. He said, "You raise the level of discourse within a classroom, and you make it easier for faculty to teach if you don't have such a variety of abilities."<sup>316</sup> "[The Policy Direction on Admissions] has had a lasting impact," said former Vice Chancellor for Fiscal Affairs, William R. Bowes. "I think if you look at the change in the System over the last ten years, it has definitely become a much better

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<sup>314</sup> Barnes, interview.

<sup>315</sup> Wagner, interview.

<sup>316</sup> Ibid.

system, and I think that's really part of what contributes to that. You get better students, you get better faculty, and it tends to create that synergy of excellence, if you will."<sup>317</sup>

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<sup>317</sup> Bowes, interview.

## CHAPTER SIX: AT THE HELM

Throughout his nearly three-hour initial interview, Portch credited many others for their particular roles in the development and implementation of the strategic plan and stressed the importance of the “the right people at the right moment.”<sup>1</sup> When asked about his leadership style, he replied, “Well, you know, before you can lead them, you’ve got to hire them, and that’s the most important part of the whole thing.”<sup>2</sup> Indeed, Portch takes great pride in the staff members and presidents he hired during his chancellorship in the University System of Georgia. Regent Leebern stated, “He surrounded himself with good people.”<sup>3</sup> In this chapter, I will examine Portch’s leadership style. He was a transformational leader who raised the level of awareness in and of the system; he increased the collective consciousness about the importance of education at all levels and its value to both individuals and society; and he offered ways to achieve the system’s collective ambitious goals.<sup>4</sup> Portch used the strategic plan to transform the University System of Georgia from a sleeping giant to a national player, and in so doing, he proved to be a highly effective leader. By “leader,” I mean to say Portch had a destination – the El Dorado that was the Vision Statement – and he had countless people who wanted to follow him on the never-ending journey toward “access to academic excellence.”

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<sup>1</sup> Portch, interview.

<sup>2</sup> Ibid.

<sup>3</sup> Leebern, interview.

<sup>4</sup> James L. Bess and Jay R. Dee, *Understanding College and University Organization: Theories for Effective Policy and Practice* (Sterling: Stylus, 2008), 841.



With regard to Portch's senior staff, he had a keen ability to identify people's unique talents and capabilities, and he was able to lead them by giving them individual attention and instruction. While consideration for individual needs is one characteristic of transformational leadership, it is also reflective of the leader-member exchange (LMX) model, which emphasizes the interpersonal relationships of leaders and followers.<sup>5</sup> The LMX model proposes that effective leaders demonstrate particular attention to subordinates as individuals. An effect of this kind of leadership is the emergence of a cohort of subordinates whose interactions with the leader and among themselves are friendly and trusting.<sup>6</sup>

Clearly, the most important staff member in the creation of the strategic plan document itself was Special Assistant to the Chancellor Sidney Bremer. Portch needed an exceptional writer who could take a vast collection of ideas and craft it into something articulate and ambitious, but that individual needed to be someone with whom he could work very closely to ensure that she captured his vision. "That's why he wanted to bring with him that year somebody that he knew and trusted from Wisconsin, because he didn't know anybody here, to be his right hand in helping him write the strategic plan," said Weber. "As it turned out, bringing Sid was probably the best thing in the world."<sup>7</sup> Portch and Bremer worked as one in crafting the plan. In fact, while describing the process of creating the plan, Bremer noted, "And when I talk about Steve, I really am thinking of myself. It's almost an extension of Steve. That's how it operated. I was an extension of Steve."<sup>8</sup> Portch's second Special Assistant, Sharon James, said, "I [may have been]

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<sup>5</sup> Bess and Dee, 859.

<sup>6</sup> Ibid.

<sup>7</sup> Weber, interview.

<sup>8</sup> Bremer, interview.

viewed as Portch's hatchet woman. Who knows? But certainly, as a special assistant, you are definitely tied to [the person you are assisting] and how they are viewed.”<sup>9</sup>

Throughout his chancellorship, Portch would have a series of special assistants, usually for one-year terms, each with a unique role generally related to the strategic plan or a piece thereof, and all of them female. “He went through special assistants like Henry the Eighth went through his wives,” joked Dr. Richard Sutton, Director of International Services and Programs.<sup>10</sup>

Another critical direct report to the chancellor was the secretary to the board. Portch inherited Gail Weber from Propst as his executive administrative assistant. After an extensive external search, he ultimately chose to elevate her to the position of Secretary to the Board of Regents and Chancellor, a dual role in which she reported to both the regents and him. This was the first and only time in the history of the University System of Georgia that one person served in this dual capacity. “The Secretary to the Board needs to be in on everything that is going on in the chancellor's office,” Weber asserted, “Plus learn everything that's going on with the board.”<sup>11</sup> Portch explained, “Because I knew we were going to do so much and ask [the regents] to make decisions they never dreamed they'd have to make, paying attention to their needs was going to be important. So Gail's role in that was really key.”<sup>12</sup>

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<sup>9</sup> James, interview.

<sup>10</sup> Richard Sutton, interview by author, Atlanta, GA, September 19, 2007. (Sutton also made this joke at the November 2000 board meeting. See Minutes of the Board of Regents of the University System of Georgia Held at 270 Washington St., S.W., Atlanta, Georgia, November 14 and 15, 2000, <http://www.usg.edu/regents/minutes/2000/nov00.pdf> [accessed September 19, 2008].

<sup>11</sup> Weber, interview.

<sup>12</sup> Portch, interview.

Where attending to the regents was concerned, Portch had an opportunity to go after what he considered to be “low-hanging fruit.”<sup>13</sup> When he arrived, he discovered that the regents were often irritable when they arrived at board meetings because they had to fend for themselves when it came to parking, which was scarce on Capitol Hill. Moreover, they had to get lunch on their own between meetings, often at the state cafeteria. Without delay, Portch arranged for senior staff members to give their reserved parking spaces under the building to the regents on board days, and he established a system foundation to facilitate having lunch catered to the office for the regents and senior staff so they could get to know one another outside the board room.<sup>14</sup> “If you are asking people to make difficult decisions, you want them coming into that meeting with their heads on those decisions,” said Portch, “Not on ‘Am I going to get a parking ticket?’ or ‘Am I going to get an upset stomach from that greasy sandwich?’”<sup>15</sup> Indeed, Weber was responsible for managing every detail of the board meetings from where the regents sat at the board table to what they would eat for lunch. “And Gail *really* did that,” said Bremer. “She took care of them really well, and Steve was very clear about the importance of doing that.”<sup>16</sup> She was also responsible for scheduling their board-related speaking and social engagements and served as the chief liaison between the chancellor and the regents.

In her capacity as the chancellor’s executive administrative assistant, Weber was also responsible for managing the day-to-day operations of the chancellor’s office, but

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<sup>13</sup> Ibid.

<sup>14</sup> Prior to Portch’s chancellorship, the University System of Georgia did not have its own foundation, and because of state regulations, the office could not use state funds to pay for regent lunches. The foundation would also be instrumental in establishing the Chancellor’s Award for Collaboration.

<sup>15</sup> Portch, interview.

<sup>16</sup> Bremer, interview.

perhaps her most important role was as Portch's closest advisor. "I was on the inside circle about October [1994]," she recounted. "He said, 'You are my confidant. You and I are going to talk about anything.... I'm going to tell you things that I'm not telling anybody else.' Well, that changed everything."<sup>17</sup> James stated:

Gail was absolutely crucial to Steve in working with the regents. She knew so much... and I think Gail adored Steve and vice versa. Steve's relationship with Gail over time went way beyond just their work relationship in the office.... He genuinely cares about Gail.... Gail in some ways might have been Steve's most valuable advisor, and Steve recognized certainly what Gail's skills were, what her strengths were, and I think he really encouraged her to be all that she could be.... I would say that out of all the people in the office, including me, Gail was his closest confidant, and he probably talked with her more about issues having to do with the regents. Gail had a whole storehouse of information not just about regents, but about campuses, players, and so I think she was a real source of information. And Gail would probably not have presumed to give him direct advice, but I think sometimes he would ask her for that. Without Gail things would not have run as smoothly. She took very good care of Steve.... Gail was key, I think, in Steve's success.<sup>18</sup>

Regent Leebern referred to Weber as an "ombudsperson" and said, "Gail could tell [Porch] that these are the minefields that you may step on that may blow up in your face, and you need somebody like Gail to keep that from happening."<sup>19</sup> "She was the only person for a while there who could tell Steve, 'Don't do that,'" President Skinner stated, "Nobody else would do it to my knowledge."<sup>20</sup>

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<sup>17</sup> Weber, interview.

<sup>18</sup> James, interview.

<sup>19</sup> Leebern, interview.

<sup>20</sup> Skinner, interview.



Secretary Gail S. Weber and Chancellor Stephen R. Portch

Portch also set out to develop a strong leadership team and system office staff. He said, “Well, first, we had to have the openings, so there were a lot of changes which took place – retirements, people moving on, and so on.”<sup>21</sup> Indeed, he reorganized the system office and let some employees go. “I would have to say every single one should have gone, but there are not too many people who could do it as easily as he did,” said Weber. “He didn’t flinch.... He just knew that the regents were laughing at a few people. They didn’t do the job; they didn’t know what was going on.”<sup>22</sup> Randall Thursby, former Chief Information Officer, recounted:

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<sup>21</sup> Portch, interview.

<sup>22</sup> Weber, interview.

He basically purged the system office.... It was October or November of '94 when ... either he called people in or Art Dunning visited offices, and you know, people were gone, either immediately or a few people had a month or some had until the beginning of the year, but you were gone.... The whole communications office was gone because he wanted to take a different direction and felt like they needed a whole different face on communications to the press and everything else. The vice chancellor for business and finance was gone.... Some places, it might be one or two people. In other places, it was, you know, the whole area.... And then he called everybody else together the next day and he said, "I've made all the changes I'm going to make until my new staff is on board."<sup>23</sup>

Bremer assisted Portch in evaluating the system office. "Steve was willing to fish or cut bait" she said. "That first year was a year of getting to know a lot of people in the office, and while he was very good at seeing people's talents, he also recognized that some folks were mismatched with their jobs, and I know that there were some people who left the university system either during that first year or by the end of the first year. Steve would have helped them find a graceful way to leave when he saw a mismatch, and he would have spoken to them directly about that."<sup>24</sup> James remarked, "One of the other things I think he is wonderful at is being able to ease people out of a position without totally destroying them or their egos.... I saw him do it with some presidents."<sup>25</sup> Although Thursby's memory of events is somewhat more dramatic than the others, he concluded, "He obviously sent a signal that he was no-nonsense, that we were going to do things differently.... It also sent a signal to the campuses that the system office was going to be a different entity than it was before. So I think in that sense, it did work."<sup>26</sup>

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<sup>23</sup> Thursby, interview. Note, the system office staff reductions did not include anyone from the Office of Information and Instructional Technology, which was budgeted separately during that period. (Email from Randall Thursby to author, October 14, 2008.)

<sup>24</sup> Bremer, interview.

<sup>25</sup> James, interview.

<sup>26</sup> Thursby, interview.

At the January 1995 board meeting, Portch introduced Arlethia Perry-Johnson as the new Assistant Vice Chancellor for Media and Publications.<sup>27</sup> Regent Baranco recalled, “We realized and recognized that if we were going to have this national presence, we had to have somebody that knew how to deliver that, and she was the person selected to do it, to put us on the map.”<sup>28</sup> One of Perry-Johnson’s first assignments was a full-page advertisement that would run in the March 10, 1995, issue of *The Chronicle of Higher Education* to advertise five key administrative positions.<sup>29</sup> The headline of the advertisement read, “Georgia is on the move! And so is the University System of Georgia.”<sup>30</sup> Highlighting the state’s strong economy, the HOPE Scholarship Program, and Governor Miller’s promise to provide 6% raises for four years, among other things, the advertisement put the higher education world on notice that the system was headed in a new direction. “It was an exciting development,” stated Vice Chancellor for External Affairs, Tom Daniel. “It was rewarding to see the system be highlighted.... It was also exciting to hear Chancellor Portch articulate the fact that the system wanted to be a national player.”<sup>31</sup>

In his September 1995 report to the board, Portch introduced several new staff members.<sup>32</sup> In his introductory remarks, Portch paraphrased President Franklin Delano Roosevelt as saying one needs to have “sense enough to pick good people to do what should be done and self-restraint enough to keep from meddling with them while they do

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<sup>27</sup> Minutes, 1994-1995, 171.

<sup>28</sup> Baranco, interview.

<sup>29</sup> Portch, interview.

<sup>30</sup> “Bulletin Board: Positions Available,” *The Chronicle of Higher Education* (March 10, 1995), B59.

<sup>31</sup> Daniel, interview.

<sup>32</sup> Five positions had previously been announced at the July 1995 board meeting, at which Portch noted that his office had received 1,458 applications for those five positions. Minutes, 1995-1996, 36.

it.”<sup>33</sup> Among the new staff members were Dr. James L. Muyskens, Senior Vice Chancellor for Academic Affairs, and Dr. Lindsay Desrochers, Senior Vice Chancellor for Capital Resources.<sup>34</sup> “It was really only when I got my team in place – particularly Muyskens and Desrochers – that I really thought we had the capacity to really [implement the plan],” Portch said. “There were some very key hires and some very difficult but key decisions we made in hiring that made the strategic plan work.”<sup>35</sup>

Portch’s senior leadership team consisted of three senior vice chancellors, each with leadership responsibility for one division of the system office. In addition to hiring Desrochers and Muyskens, he elevated Arthur N. Dunning from an interim capacity to Senior Vice Chancellor for Human and External Resources. Art Dunning had been Chief Executive Officer for the Georgia Partnership for Excellence in Education and was about to move into a faculty position at the University of Georgia Institute of Higher Education when, prior to Portch’s hire, Interim Chancellor Harry S. Downs had asked him to come to the system office as Interim Executive Vice Chancellor and serve for six months during the chancellor transition.<sup>36</sup> “Art’s a good soldier... and I think he really appreciated Steve giving him real responsibility and seeing the kinds of things he could do,” said James. “I think he was very loyal to Steve.”<sup>37</sup> Lindsay Desrochers said, “Dunning had been somebody inside the university system for many years. He knew the ins and outs of the operation, and he knew how to get problems solved.”<sup>38</sup> Portch stated:

With Art Dunning, we had the continuity and historical perspective. And those three people are very, very different as people, in their backgrounds, their

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<sup>33</sup> Minutes, 1995-1996, 100.

<sup>34</sup> Ibid.

<sup>35</sup> Portch, interview.

<sup>36</sup> Dunning, interview.

<sup>37</sup> James, interview.

<sup>38</sup> Lindsay Desrochers, interview by author, telephone, June 14, 2007.



experiences, and as human beings. And yet, somehow, that worked, and there was a sort of mutual respect among the three which I thought worked really well. I have certainly seen in other systems where egos get in the way and there are boundary disputes, but I never really saw that with those three. They were not territorial in that way. So, that was very important.<sup>39</sup>

Indeed, the three senior vice chancellors were vastly different. Art Dunning was an African-American who had grown up in a small Alabama community during segregation.<sup>40</sup> He not only understood the history of the University System of Georgia, but also he had lived the history of the South. Portch, of course, did not have that kind of historical perspective, and regarding the Albany flood in particular, Dunning remarked:

I remember my first 18 years, my liberties and my freedoms were controlled by law. I spent 18 years of my life under Jim Crow segregation laws.... So over the years, I've spent the last two-thirds in somewhat of an open system. It has been fascinating to watch this person who didn't have any of the historical underpinnings and cultural underpinnings and how that affected his leadership in a part of the country that is passionate about the past. Like Faulkner says, 'In the South, past is not dead; it's not even past.' To get a person like Portch, who's not a native of the nation, not a native of the region, to lead... probably the most dramatic time in the history of this state... I think this state will be indebted to Portch for generations to come.<sup>41</sup>

A native Minnesotan, Jim Muyskens was a very tall, thin, composed man with a Master of Divinity degree from Princeton Theological Seminary and a doctorate in Philosophy from the University of Michigan.<sup>42</sup> He was Dean of the College of Arts and Sciences at the University of Kansas when Portch sought him out.<sup>43</sup> Portch recollected:

I went out to Kansas to meet with him and really recruit him to come, selling him the same bill of goods Buzz Shaw sold me – that this was going to be a great learning opportunity to prepare him for a presidency, and it was. He was a very good foil for me because he was a change agent but in a very understated way. In fact, we liked and respected him because he was a sort of quintessential sort of

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<sup>39</sup> Portch, interview.

<sup>40</sup> Dunning, interview.

<sup>41</sup> Ibid.

<sup>42</sup> Karen W. Arenson, "A Former Hunter Professor Will Head Queens College," *New York Times* (April 30, 2002), <http://query.nytimes.com/gst/fullpage.html?res=9A0DEFDB1631F933A05757C0A9649C8B63> (accessed July 30, 2008).

<sup>43</sup> Muyskens, interview.

faculty type person, but he was very change-oriented and people barely knew that he was.<sup>44</sup>

Jim Muyskens saw a unique opportunity in the role being offered to him:

A lot of the basic work was done when I got there.... That was in fact the hook that got me. They really had a plan here. I saw my role when I came to really be someone who could implement, fill in the blanks. Steve is the visionary, has great ideas, but he wasn't going to get down there and work with all the vice presidents and presidents to implement this. That fit exactly the kind of person I was, sort of a behind-the-scenes person; he was upfront.<sup>45</sup>

Sharon James recalled, "Jim was very quiet, worked really well with the campuses and the faculty, and that was an important thing for him to do because he was the academic affairs person."<sup>46</sup>

A native of Los Angeles, Lindsay Desrochers was a petite, "pert, feisty, red-headed 'dynamo'" with "unstoppable energy and determination" and a doctorate in Political Studies from the University of California, Berkeley.<sup>47</sup> Porch recounted:

Lindsay was really a very key component because she was very unusual in her strategic policy orientation. She had a Ph.D. and is a driven person obviously, and when you are trying to do what we were trying to do here, you need that sort of drive. She was very driven. Again, we recruited her. I brought her before the board with some trepidation because the regents were not used to seeing a female in a financial/facilities leadership position, much less a female from California with a Ph.D. in political science. They said, "Go for it."<sup>48</sup>

President Nesbitt remarked, "He brought in Lindsay Desrochers, real unusual for a chief finance officer."<sup>49</sup> President Lord added:

The one that I thought was really a trailblazer was Dr. Desrochers because she came in and she was the first woman on his staff. She had a hard road because of the male dominance of the board.... One of the board members who was on the

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<sup>44</sup> Porch, interview.

<sup>45</sup> Muyskens, interview.

<sup>46</sup> James, interview.

<sup>47</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia Held at 270 Washington St., S.W., Atlanta, Georgia, September 12 and 13, 2000, <http://www.usg.edu/regents/minutes/2000/sept00.pdf> (accessed May 21, 2008).

<sup>48</sup> Porch, interview.

<sup>49</sup> Nesbitt, interview.

facilities committee at one of the meetings actually turned to her and said, “Now, you can take the notes.” She was the person [leading] the meeting, but that was his comment to her.... She handled it very gracefully, and there was no confrontation, but it was quite obvious what had happened. Anyway, her leadership was effective, but some people weren’t willing to let her be as effective as she could have been. I’ll let it go at that.<sup>50</sup>

According to others, that regent may not have been the only one who had a problem with a woman as the system’s chief financial officer. Linda Daniels, who worked in Lindsay

Desrochers’ division, remarked:

I was embarrassed and angered by the way I thought our own chief business officers were disrespecting her in the early days. In the first couple of years, it seemed to me like there was a certain cohort of them that was systematically trying to undermine her and taking advantage of every prejudice and gender bias that they could to do that, and I think that’s probably one of the reasons I have such profound respect for her today, because a lesser person would have stooped to that level. I mean, she was certainly in a position of power that she could have gotten even with a lot of those folks, and I never ever once in her career saw her stoop to the level of her detractors. She always treated people with the utmost respect, and she was too smart to not know what was being done, but she never stooped to that kind of mean, undercutting kind of approach. She treated people with respect and expected them to treat her the same, and ultimately, I think by the time she exited the system, she probably made a lot of converts because you didn’t see that kind of thing going on in the latter part of her tenure. But boy, they sure tried at the beginning, and how she handled it was to me an inspiration!<sup>51</sup>

Shortly after she came to the University System of Georgia, Lindsay Desrochers recruited William R. Bowes from Southern Connecticut State University, where he was Vice President for Finance, to serve as Assistant Vice Chancellor for Fiscal Affairs.<sup>52</sup> He characterized her as very controlling and detail-oriented, a “hatchet person” in the eyes of some financial officers and presidents.<sup>53</sup> “This may be something that [women] would face still in many jobs, that if I don’t act tough that I’ll be just trampled on, and that may be why she wanted to always assert herself in terms of the control that she had,” he

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<sup>50</sup> Lord, interview.

<sup>51</sup> Daniels, interview.

<sup>52</sup> Bowes, interview.

<sup>53</sup> Ibid.

speculated. “I suppose that some women feel that they have to exhibit a certain amount of toughness. Otherwise, they’re not going to be treated with respect.”<sup>54</sup> Portch clearly had no issue with Lindsay Desrochers’ gender. “I think Lindsay was [Portch’s] right-hand man,” Bill Bowes said. “There’s no doubt in my mind that when it came to the tough decisions, he really relied on her more so than the other two. That was pretty evident.”<sup>55</sup>

Several women interviewed noted that Portch was neutral about gender. “I got the impression he didn’t even notice if you were a man or a woman, which is not a very Southern thing,” said Linda Daniels with a laugh. “I mean, Southern women, Southern culture, you know... there is a distinct acknowledgement of one’s femininity, good, bad, or indifferent, but it’s very much a part of one’s interaction with you as a general rule, and it certainly was not with Stephen Portch.”<sup>56</sup> President Lord noted that before Portch came to the system, she and President Betty L. Siegel at Kennesaw State College referred to themselves as the “onlies” because they were the only female presidents in the system.<sup>57</sup> By the time of Portch’s retirement in 2001, there were eight female presidents in the system. “The sheer fact that he would look at people for what they could bring instead of looking at their gender just made a big difference,” said Lord, “And it caused a higher level of acceptance of the two women who were present than would have otherwise been possible because he brought other women to the table.”<sup>58</sup> Portch also hired Annie Hunt Burriss to manage the Office of Development and Economic Services, which he created to further economic development partnerships in the system. Burriss stated:

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<sup>54</sup> Ibid.

<sup>55</sup> Ibid.

<sup>56</sup> Daniels, interview.

<sup>57</sup> Lord, interview.

<sup>58</sup> Ibid.

One of Steve's great talents is being able to pick people. He got the right people on the bus, a really divergent group of people on the bus, and forever will I be indebted to him for him not looking at somebody and judging them by their birthright. I think he is distinctive and unusual in his ability not to see you because you have ovaries or because you have a pigmentation that is different than others. He tried to figure out what people's gifts were and then let them move in their strengths.<sup>59</sup>

"He was more ecumenical when it came to looking at *people* as opposed to looking at sex, and he accepted people on the basis of their ability as opposed to their gender," said President Lord, "And that was a refreshing difference because this university system had been basically a bastion of male dominance and male power."<sup>60</sup>

As Portch's Senior Vice Chancellors, Desrochers, Dunning, and Muyskens brought to the senior leadership table a diverse collection of complementary strengths and worked well together in what Bensimon and Neumann would characterize as a "complex team." That is, Portch created a leadership team whose members' cognitive diversity was complementary and mutually respected and who saw themselves as a team.<sup>61</sup> James stated, "[Portch is] not afraid to have very strong people, and he's not afraid to listen to them. You know, you have to have strong ego strength to make a strong team, and I think he truly recognizes you can't do everything yourself. You need a lot of help."<sup>62</sup>

Lindsay Desrochers said:

I think he had a really good team, and he put it together. I give him credit for that. Muyskens and I got along very, very, very well. We were, you know, Mutt and Jeff, if you will, or tit and tat. I mean, I think Jim's strengths were his mainstream knowledge of and sensitivity to faculty concerns, curricular issues. Mine has always been development, you know, financial... so we did complement each other very well.<sup>63</sup>

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<sup>59</sup> Annie Hunt Burriss, interview by author, Atlanta, GA, June 12, 2007.

<sup>60</sup> Lord, interview.

<sup>61</sup> Estela Mara Bensimon and Anna Neumann, *Redesigning Collegiate Leadership: Teams and Teamwork in Higher Education*, (Baltimore: The Johns Hopkins University Press, 1993).

<sup>62</sup> James, interview.

<sup>63</sup> Desrochers, interview.

Muyskens noted that he and Lindsay Desrochers had different styles in working with Portch. “In retrospect, I should have been more... specific... but Lindsay, would always want to go through exact things... and he seemed to be comfortable with both approaches. So I think he really did try to hire good people and let them go with their style. We would often comment about how we were so different.”<sup>64</sup> Bremer remarked:

He had a talent for seeing what people brought to the table... and he really believed in teams.... He understood that each person brought something special to the table and the team was the result of all those different people. So each person didn't have to do everything well.... And that's one of the things he taught me: don't look to have all the same kind of people on a team. Make sure that you've got a variety of perspectives represented on your team and a variety of gifts and abilities represented there, too.<sup>65</sup>

Another important staff member was the Vice Chancellor for External Resources, Thomas E. Daniel, who had been the system's primary legislative liaison since the 1983 session and still serves in this capacity.<sup>66</sup> Born in Hogansville, Georgia, Daniel had graduated from the University of Georgia in 1974 with a bachelor's degree in political science and had dedicated his entire career to Georgia politics, particularly in the campaigns of Governors George Busbee and Joe Frank Harris.<sup>67</sup> James stated, “Tom was an incredibly political animal. Tom looks at everything through a political viewpoint. So all of his advice was sort of based on how things would fly with legislators, the Governor, and he had lots of good connections.... You need somebody who brings the political perspective.”<sup>68</sup> Arlethia Perry-Johnson remarked, “Some people said [Portch] didn't have an effective a hand with the legislature, but I know he placed a lot of faith and confidence

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<sup>64</sup> Muyskens, interview.

<sup>65</sup> Bremer, interview.

<sup>66</sup> Daniel, interview.

<sup>67</sup> Daniel bio provided by Bertha Harris, August 4, 2008. A copy of this document is in the author's possession.

<sup>68</sup> James, interview.

in Tom Daniel, and then I think he counted on Tom to tell him where his time would be best used in that venue.”<sup>69</sup>

Portch was true to his introductory remarks at the September board meeting. He respected the expertise of those he managed, and he gave them room to do their jobs. In fact, staff members and presidents alike reported that he was not a micromanager. Lindsay Desrochers said, “He would give us a lot of leeway to be out there doing what we think was the right thing.”<sup>70</sup> Jim Muyskens also recounted, “He would kind of just want to know what was happening, but I really had free rein, I felt.... And yet, we’d approach things in almost the same way, so I felt very confident... that I could make a decision and didn’t even need to consult with him.”<sup>71</sup> President Lord remarked, “I think a lot of his early strength derived from hiring effective leaders, and actually, what he did was he empowered the staff in ways that had never, at least in my eyes, that had never existed.”<sup>72</sup> Bremer stated, “[The strategic planning process] really proved that notion about a team. Each one of the people did have a different kind of skill that they brought to the table.”<sup>73</sup> Even though Portch spent most of his time working with his direct reports, he was able to bring together key staff members to focus on critical issues. Arlethia Perry-Johnson explained:

What I particularly liked was something he had called the “swat team,” and it’s probably what others would call a cabinet, but it wasn’t driven as much as your title and your position as much as it was driven by your functional role and whether or not your unit would have intelligence to bring to an issue or would have operational responsibilities to carry out something. So any and all people that were involved in addressing a challenge or an issue or an opportunity were brought to a swat meeting and allowed to brainstorm and strategize around issues

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<sup>69</sup> Perry-Johnson, interview.

<sup>70</sup> Desrochers, interview.

<sup>71</sup> Muyskens, interview.

<sup>72</sup> Lord, interview.

<sup>73</sup> Bremer, interview.

to come up with game plans. He was very much a planner, believed very much in documenting what the game plan was so that all parties knew what their role was. Your role was clearly defined, and therefore, accountability was a big thing for him. You were told what he expected, you were given all your marching orders very definitively, and then you were expected to follow the game plan. If you were going to go off course, then he expected to be told up front and why, and as long as you kept him informed, deviations were acceptable, but he didn't want any surprises.<sup>74</sup>

Because Portch was not a micromanager, he generally kept his focus on his direct reports, including 34 presidents, and those to whom he reported directly. He focused the vast majority of his time working directly with the regents and presidents. President Nesbitt, who served one year as one of his special assistants, remarked, "I may have been his special assistant, but I had to make an appointment to see him. I mean, I couldn't just walk into his office."<sup>75</sup>

Portch had created his own team of senior vice chancellors, and he expected each of them to build their own teams within their respective divisions. Unfortunately, his focus on the top level had the unintended consequence of leaving some staff members at other levels of the system office feeling unnoticed. This is an unfortunate unintended side-effect of the leader-member exchange model of leadership. While close personal ties can develop between a leader and his/her subordinates, "One result of this phenomenon is the emergence of a core group of subordinates whose relationships with the supervisor and with each other are warm and trusting and the rise of a second group who are largely excluded from important decision-making processes. The larger the in-group, the more the alienation of the out-group."<sup>76</sup> Thursby remarked, "There was no rapport between him and the average staff person.... A lot of the average staff basically looked on him as just

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<sup>74</sup> Perry-Johnson, interview.

<sup>75</sup> Nesbitt, interview.

<sup>76</sup> Bess and Dee, 859.



not caring about them.”<sup>77</sup> Bill Bowes recalled, “I found that on a one-on-one basis, he was much more guarded than the public person.... In public, he was very glib, he was very on.”<sup>78</sup> Some staff members described Portch as reserved. For example, David Morgan said, “I found him a bit aloof.... When he was introduced, he talked about being informal and he would just pop around in people’s offices and see them and so forth. Well, you know, the whole time that I was on the sixth floor, I don’t believe he was on the sixth floor a half a dozen times the whole time he was there. He certainly never *popped* into my office.”<sup>79</sup> Linda Daniels stated:

I was initially very frustrated because I saw Stephen Portch as a very dynamic person, and yet it was very obvious to me that he didn’t have, he couldn’t give me the time of day. I mean, he didn’t have time for me. [laughs] He was putting his senior leadership team together, and what I observed is he then let his senior leadership team build their own teams, and he focused his energy on getting the best people... in the top three positions. He focused his energy at the highest level and in getting out into the system, dealing with the presidents at the institutions.<sup>80</sup>

Arlethia Perry-Johnson recounted a staff meeting shortly after she came to work in the system office in which some staff members complained while Portch was not in the room that they did not have access to him. When he came into the room, Perry-Johnson explained their concerns on their behalf. In response, he tried to illustrate how many people he might have to be accessible to on a daily basis. She recalled:

He did an incredibly effective diagram, which pretty much was in journalistic terms what we call the inverse pyramid, where he showed us who his audiences were and where he had to spend the predominance of his time, and it started with the governor and the 200 plus legislatures, and at that time the 16 regents and then, at that time, the 34 presidents and then his direct reports, which at the time were 3 senior vice chancellors, and then ultimately the staff. And then, some people left that meeting feeling that he had expressed that we weren’t important. So it achieved the opposite of what he wanted it to achieve.... I mean that was

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<sup>77</sup> Thursby, interview.

<sup>78</sup> Bowes, interview.

<sup>79</sup> Morgan, interview.

<sup>80</sup> Daniels, interview.

300 plus people on a daily basis that left little time for interaction with staff beyond the senior vice chancellors level.<sup>81</sup>

Speaking of the same staff meeting, Weber recollected, “He got up and gave a logical answer, a reasonable and a reasoned answer, but you know, when you feel you’re left out, you don’t care. You don’t really care.”<sup>82</sup>

Those who worked closely with Portch, however, suggested that perhaps he was misunderstood. Weber explained:

A lot of that criticism came because he was very serious. People thought he was cold. He had come in saying he was a hands-on people person, and he really isn’t a people person, unless you’re in there with the give and take with him all the time. Once you can say anything to him you want to, he trusts you, then he’s a people person. But he didn’t have time, he really didn’t have time, but he did say he was a people person. Within a month, people were saying, “A people person? Who’s ever seen him around here?” And of course, that’s no understanding of what he was doing in that moment.<sup>83</sup>

Some senior staff members and presidents described Portch as somewhat bashful.

President Nesbitt said, “...Underneath, he’s kind of shy.”<sup>84</sup> Annie Hunt Burriss speculated:

I think Steve is an introvert, which means he goes within for his strength, but he has highly developed extroverted skills. So he can communicate very gregariously.... It intrigued me [that] he often spoke to audiences looking just over the tops of their heads. I think it’s because it made him uncomfortable feeling their eye contact, but you know, I think when you’re in a leadership role like that, everybody is trying to get something out of you, and you have to be withdrawn to a certain extent.<sup>85</sup>

President Skinner remarked, “Steve loves Barbara and his dogs and his horses, and that’s about it.”<sup>86</sup> That is not to say, however, that he was an elitist. He often took the

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<sup>81</sup> Perry-Johnson, interview.

<sup>82</sup> Weber, interview.

<sup>83</sup> Ibid.

<sup>84</sup> Nesbitt, interview.

<sup>85</sup> Burriss, interview.

<sup>86</sup> Skinner, interview.

chancellor's office staff, from the secretary to the board to the student assistant, to lunch and occasionally invited them to his home. When La Toya Handsford, the student assistant who worked in the chancellor's office starting in 1997, graduated from Georgia State University in fall 2000, Portch not only attended her graduation, but presented her with her degree.<sup>87</sup>

Just as Portch set out to establish a strong leadership team, he was also determined to create a first-rate team of presidents. "I put a lot of effort and made a very high priority of selecting the presidents" he said. "I visited every president's campus before hiring them. I spent a lot of time on that, and I think I selected 25 presidents in all, and [that is] probably the most important thing I did and the one which has the greatest long-term impact in many ways."<sup>88</sup> On July 13, 1994, at his very first board meeting as Chancellor, Portch made his first presidential appointment, Dr. G. Wayne Clough at the Georgia Institute of Technology.<sup>89</sup> At the meeting, he noted that "the long-term legacy of any institutional leader is the talent he or she appoints."<sup>90</sup> Portch was very involved in the Georgia Tech presidency search, and he joined the regents who visited Virginia Polytechnic Institute and State University, where Clough was the Dean of the College of Engineering.<sup>91</sup> Regent Dwight Evans was chair of the search committee, and he recalled that while the regents were talking with Clough's colleagues, Portch would step out of the room to question Clough's secretary, professors, and the janitor.<sup>92</sup> Clough remarked

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<sup>87</sup> Madlyn Hanes, interview by author, telephone, June 18, 2007; Minutes of the Meeting of the Board of Regents of the University System of Georgia Held at 270 Washington St., S.W., Atlanta, Georgia, January 11 and 12, 2000, <http://www.usg.edu/regents/minutes/2000/jan00.phtml> (accessed May 21, 2008).

<sup>88</sup> Ibid.

<sup>89</sup> Minutes, 1994-1995, 36.

<sup>90</sup> Ibid.

<sup>91</sup> Evans, interview.

<sup>92</sup> Ibid.

that when it came to presidential hires, “He was a hands-on guy in that regard.”<sup>93</sup> Many interviewees lauded Clough’s presidency. “You hear people talk about... the right guy at the right time, and he was it,” said Jimmie McEver, who was a Georgia Tech student and Chair of the systemwide Student Advisory Council, 1994-1995.<sup>94</sup>

Portch’s second presidential appointment, one of only two actions taken at the board’s August 1994 strategic planning retreat at the Jolley Lodge, was Dr. Beheruz N. Sethna at West Georgia College.<sup>95</sup> Wagner was chair of the campus presidential search committee. He recalled, “I could tell just by my interactions with [Portch], this is a guy who’s going to pick people very carefully and then give them the tools and the confidence to do what he, Stephen Portch, wants them to do.... He got heavily involved in the selection of the president of this institution, and that was a good thing. There was a marvelous relationship between Sethna and Portch [such that] this place has been transformed since then.”<sup>96</sup> Sethna was the first person of an ethnic minority to be a president of any institution other than a historically black college or university in the University System of Georgia, and he was the first person of Indian origin to be president of any institution of higher education in the United States.<sup>97</sup> Not everyone in the West Georgia College community was pleased with the appointment of an Indian as President, however.<sup>98</sup> Wagner recounted that certain prominent people in the town of Carrollton were outspoken against hiring a minority person to lead the institution and contacted their local legislators and regents. He said:

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<sup>93</sup> Clough, interview.

<sup>94</sup> Jimmie McEver, interview by author, telephone, August 31, 2007.

<sup>95</sup> Minutes, 1994-1995, 42.

<sup>96</sup> Wagner, interview.

<sup>97</sup> Beheruz N. Sethna, email to author, July 7, 2008.

<sup>98</sup> Beheruz N. Sethna, interview by author, Atlanta, GA, July 5, 2007; Wagner, interview.

I was blown away by it. I never expected that, and Portch was steadfast in his support of Sethna as defense of all that, and rightly so, and so was [Regent] Edgar Rhodes.... And the other one who was Sethna's strongest supporter was [Regent] John Henry Anderson. I mean, Anderson used to get red in the face when people talked about Sethna's ethnicity and that sort of thing.<sup>99</sup>

President Sethna stated, "These individuals stood tall and basically did not bow to that kind of [pressure]. I think that's phenomenal. That is truly phenomenal, but that it happened was sad..."<sup>100</sup> President Skinner remarked, "I think it's a testimony to first and foremost, to Beheruz that he was able to survive all that, and secondly, I don't think he could have survived it without Steve's help. There's no doubt in my mind."<sup>101</sup>

Portch sent a strong signal that diversity was important to the system. James stated:

He believed that if you sent a message from the top down that what we want is very qualified people, but we also want to increase diversity and that you should really work hard to bring a slate of candidates that reflects diversity, but who are also are qualified. Those people are out there, but you may have to look beyond the sort of traditional movement. You know, you may be looking for a president and you may not find somebody who went from being a department chair to dean to vice chancellor to whatever.<sup>102</sup>

A week after he became chancellor, Portch learned that a yearlong search for a president at DeKalb College had only resulted in one candidate who was not particularly desirable.<sup>103</sup> He and Regent Baranco decided to start the search again with the help of a professional search firm. As a result, he appointed Dr. Jacqueline Belcher to the position. She would be the first African-American president of a non-HBCU in the system.<sup>104</sup>

Nesbitt remarked, "He definitely put his money where his mouth was when he said, 'I

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<sup>99</sup> Wagner, interview.

<sup>100</sup> Sethna, interview.

<sup>101</sup> Skinner, interview.

<sup>102</sup> James, interview.

<sup>103</sup> "Georgia's HOPE."

<sup>104</sup> Ibid.

want diversity.”<sup>105</sup> Portch took chances on people the way others had taken a chance on him. “He was willing to do something pretty rare and hire a dean to become a president and take on a brand new mission,” said President DePaolo. “I will be eternally grateful to him for that, because how often in life do you get a chance to do that? Not just become president of the university, but to create this whole new mission.”<sup>106</sup>

Portch was very forthright in communicating his expectations to his presidents. President Skinner stated, “I think the way he dealt with presidents was very straightforward. He made his expectations clear. He didn’t equivocate.”<sup>107</sup> “I thought he was pretty straightforward with us,” reiterated President Clough. “He didn’t mislead us.”<sup>108</sup> At his first meeting with the system’s 34 presidents, the first item on the agenda was “Rules of Engagement, Code of Conduct, or How to Get Along with the New Chancellor.”<sup>109</sup> He presented the presidents with the following list of “Principles, Expectations and Commitments,” which he would also present to each new president he appointed:

1. **The President should not surprise the Chancellor.**  
The Chancellor shall not surprise the President.
2. **The President should inform the Chancellor of substantive written (cc: all correspondence) or oral contacts with Regents and Legislators.**  
The Chancellor shall inform the Presidents of all substantive contacts with Regents and Legislators concerning their institutions.
3. **The President should not conduct policy or budget end-runs without the Chancellor’s approval; to do so with budget items will result in a reduced general allocation.**  
The Chancellor shall be open, fair, and reasonable in supporting budget initiatives.

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<sup>105</sup> Nesbitt, interview.

<sup>106</sup> DePaolo, interview.

<sup>107</sup> Skinner, interview.

<sup>108</sup> Clough, interview.

<sup>109</sup> Memorandum from Portch to Presidents, August 1, 1994.

4. **The President shall see all budget allocations, policy initiatives, and items concerning your institutions in draft form prior to submission to the Board of Regents.**

The Chancellor shall entertain the occasional request for changes to these draft documents.

5. **The President shall have increased autonomy, responsibility, and flexibility.**

The Chancellor shall hold you accountable.

6. **The President should provide the Chancellor an annual accomplishments and goals statement.**

The Chancellor shall use this document as the basis for annual evaluations.

7. **The President shall be responsible for sound personnel practices, affirmative action accomplishments, good fiscal management, and nurturing a positive educational environment.**

The Chancellor shall provide access to any expertise needed in these areas.

8. **The President shall be the institutional voice on all items.**

The Chancellor shall not intrude in campus matters without the involvement of the President.

9. **The President should continue professional growth.**

The Chancellor shall insure such opportunities exist.

10. **The President should take vacations.**

The Chancellor shall not intrude on your vacations.<sup>110</sup>

President DePaolo remarked, “They were very smart rules.”<sup>111</sup> Portch’s philosophy on managing his presidents was similar to his philosophy on managing his staff. He said:

I didn’t try to operate their businesses. I tried to remove as many bureaucratic impediments as possible. Probably more needed to be done in that area, but I wanted to let them run their own institutions and didn’t second-guess them. They needed not to surprise me, as I said [in the list], but you know, I could go a month without hearing from a particular president, or I might hear from a president four times in a day. That’s how I wanted it. I had been a president, so I had enormous respect for the job they have to do, and I wanted to let them do their jobs as long

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<sup>110</sup> Stephen R. Portch, “Chancellor/President Principles, Expectations and Commitments.” This document is in storage in the Chancellor’s Office files in the University System Office in the files of the Secretary to the Board in a folder marked “Chancellor.” A copy of this document is in the author’s possession.

<sup>111</sup> DePaolo, interview.

as they would be good team players. If they weren't good team players, there wasn't a place on the team for them. Simple.<sup>112</sup>

The presidents interviewed agreed that Portch was not a micromanager. DePaolo recalled, "He mostly left us pretty much alone. He trusted us to do what we were being paid to do."<sup>113</sup> Clough said, "He was more at a higher level. He didn't bother too much with the details."<sup>114</sup> Sethna remarked:

I thought he was exceptionally good because he was there when you needed him... but he did not micromanage you. He was a hands-off kind of leader. He believed that the most important thing he needs to do is appoint a great leader and then... only be there when the person needs him or, of course, if there's absolute chaos... So, I found him to be an exceptionally good leader of presidents.<sup>115</sup>

President Skinner said, "The way he managed us was number one, he didn't try to browbeat us, but he engaged us again with ideas."<sup>116</sup> Portch used the presidents as a valuable resource, and he did engage them. "We had great meetings with the presidents," recounted Jim Muyskens. "It would be with the chancellor and a few of us senior vice chancellors with the presidents, so the presidents really had a chance to speak, and we would present them with ideas [to which] they could interact and respond."<sup>117</sup> Tom Daniel recounted, "They were looked at as a resource, which was a good thing, but they remarked during that period of time that they would get three or four different faxes from the chancellor's office in the same day, and that's true... but the presidents were given an opportunity to participate."<sup>118</sup>

However, Portch treated the presidents as a team and expected them to be team

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<sup>112</sup> Portch, interview.

<sup>113</sup> DePaolo, interview.

<sup>114</sup> Clough, interview.

<sup>115</sup> Sethna, interview.

<sup>116</sup> Skinner, interview.

<sup>117</sup> Muyskens, interview.

<sup>118</sup> Daniel, interview.



players, as he said.<sup>119</sup> Just as he did with his senior vice chancellors, Portch emphasized that the presidents should also develop their own teams. “So it’s about strengthening teams is what I was saying to the presidents. I really expect you when you get a chance to get a strong team pulled together.”<sup>120</sup> When it came to the budgetary process in particular, he did not tolerate the type of individual institutional lobbying that had previously been the norm because it undermined the board’s relationship with the legislature.<sup>121</sup> “The tendency up to that stage of every separate institution sort of having its special regent and its special state legislators was going to come to the fore,” said Bremer. “Everything depended on personal relations too much.”<sup>122</sup> Instead, Portch advanced the idea of the system and its institutions “speaking with one voice” in the budgetary process. Shelley Nickel stated:

That to me was the most remarkable, or one of the most remarkable, influences that Steve Portch brought to the board of regents. Other states have individual colleges making individual presentations on budget requests. The fact that we are funded with a funding formula as a system a lump-sum allocation constitutionally to the board of regents really gives the board and the chancellor so much authority and power over how they allocate those funds. The promise on the other side is that the chancellor has to keep all of the colleges together so that... they feel that they are being treated appropriately but so that he doesn’t have somebody going around him or around the board, trying to get additional funds for a particular project at their university. And the speaking with one voice is just one of the many ways to accomplish that. And so I think the chancellor made many efforts at having a budget request that was all-inclusive, had presidents on advisory boards for the budget request to advise the board what the budget request should be, very much included different types of presidents from different types of colleges.... Once the budget was recommended by the governor, there was something in there for everybody so you didn’t have to go and get something else. There was already a piece of the pie for you, and that was made clear up front through the process.<sup>123</sup>

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<sup>119</sup> Portch, interview.

<sup>120</sup> Ibid.

<sup>121</sup> Baranco, interview.

<sup>122</sup> Bremer, interview.

<sup>123</sup> Nickel, interview.

President Nesbitt stated, “He really wanted us to work as a system, and that kind of comes and goes, but I think by and large, when he was chancellor, we pretty much worked as a system.”<sup>124</sup> President Lord said, “Under Dr. Portch, the priorities were more system-based and collaboration was promoted, encouraged, and expected.”<sup>125</sup>

Not only did Portch expect the presidents to work together across their institutions, but he also expected them to work well with the system office staff and the regents. “There was a lot of trust between the presidents and his staff,” said President Lord. “It was their ability and their track record that really made a difference.”<sup>126</sup> Bremer stated, “Steve was also concerned to make sure that the regents and presidents worked well together or regarded each other as allies instead of antagonists, and he was very careful of that all the way.”<sup>127</sup> However, Portch was always cautious that the presidents not go around him to their regents or legislators in an effort to circumvent him. President Skinner remarked, “Steve was uncomfortable with any of the presidents hanging out with regents a lot.”<sup>128</sup>

Presidents and direct reports alike expressed that Portch mentored them in that he both recognized their strengths and helped them improve on their weaknesses. “He has an incredible gift... of figuring out what somebody’s strengths and weaknesses are,” said Annie Hunt Burriss. “So he encouraged me to build my strengths, but he also encouraged me to focus on my weaknesses.”<sup>129</sup> With regard to presidential evaluations, Portch said, “I had a good evaluation process. I only evaluated them on three or four things, and it

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<sup>124</sup> Nesbitt, interview.

<sup>125</sup> Lord, interview.

<sup>126</sup> Ibid.

<sup>127</sup> Bremer, interview.

<sup>128</sup> Skinner, interview.

<sup>129</sup> Burriss, interview.

was clear what those things were. They were all tied to the strategic plan.”<sup>130</sup> President

Nesbitt noted that Portch did not evaluate presidents in their first year:

The reason he wanted to do the evaluations not the first year but the second year was that they’d had a chance to get their feet on the ground, and it was a chance to help them early on. If you let them stay in there five or six years and they’ve had problems, it’s a little bit late. He definitely took a positive approach, trying to tell you what you did well, and if you need to work on this, get you early on so you could do it. Before I became president, he told me, ‘You need to work on focus,’ and it’s something I still need to work on.<sup>131</sup>

Bremer recounted when Portch gave her an “opportunity,” another of his favorite buzz words, to work on the budget request:

I don’t much like numbers, and I need to say that budgeting is not my favorite thing to do. And when Steve told me he wanted me to take a lead on this, frankly this was the one time I said, ‘Are you sure you want me to do this? I’m not sure I can.’ He said, ‘Well, you just consult with so-and-so and so-and-so, and it’s an opportunity. And that was standard. ‘You just do this.’ So he made it seem simple, and he always gave me very specific, simple guidance. ‘Do this, that, and the other thing, and it’s an opportunity.’ So it was an opportunity. I learned from it.<sup>132</sup>

“I learned a lot from Stephen Portch,” said Jan Kettlewell. “And if you’re learning from somebody and if you have a lot of respect for that person, you’re going to do better work in an organization.”<sup>133</sup> Tom Daniel remarked, “He had that rare gift, and it is a gift I think, to actually inspire people to accomplish more than they thought they could.”<sup>134</sup>

Moreover, Portch expected people to work harder than perhaps they knew or believed they could. “He knows instinctively what to say to people to get them to work really hard for him and with him,” said James.<sup>135</sup> “I was absolutely astonished at how much work he got out of me, because I had no sense that I was being overworked. It was

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<sup>130</sup> Portch, interview.

<sup>131</sup> Nesbitt, interview.

<sup>132</sup> Bremer, interview.

<sup>133</sup> Kettlewell, interview.

<sup>134</sup> Daniel, interview.

<sup>135</sup> James, interview.

simply that there was always something new and exciting to do,” said Sid Bremer.<sup>136</sup> “It’s funny because for me that whole year is such a blur. The reason it’s such a blur is that the pace of activity was just great. I used to wake up in the middle of the night worried about, you know, how we were going to get this next piece done,” recounted Sharon James.<sup>137</sup> “I think he was aware of the limits people had, but he also pushed them a lot. He pushed himself, and he pushed people really hard to make all this happen,” remarked John Millsaps.<sup>138</sup> “He was going to keep going, and we would keep going and he would think nothing of us having to go home and work all night to get something done. He was tough, really tough,” said Jim Muyskens. “So he was certainly a very kind and generous guy, but he drove us way too hard.”<sup>139</sup>

However, Portch was not unrelenting, and some noted that he understood the importance of rest. On one occasion when Bremer was feeling particularly overwhelmed, she recalled, “He basically ordered me to play hooky one day and go off to an art festival... one in Piedmont Park.”<sup>140</sup> President Lord stated:

He actually wanted people to go on vacation because he understood the importance of renewal.... He was so adamant that you need to renew yourself. You have to let go and go do something else so that when you come back, you have a fresh view. And he was so right, because that was in fact the case that when you did go away, you came back and could see what you were not seeing clearly before.<sup>141</sup>

Many also noted that Portch’s ability to be understanding when it came to mistakes.

“Steve was very good about sort of blinking at mistakes rather than calling it to people’s attention,” said Bremer. “And that was my lesson: Do not call any mistakes to people’s

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<sup>136</sup> Bremer, interview.

<sup>137</sup> James, interview.

<sup>138</sup> Millsaps, interview.

<sup>139</sup> Muyskens, interview.

<sup>140</sup> Bremer, interview.

<sup>141</sup> Lord, interview.

attention.”<sup>142</sup> Jan Kettlewell stated, “He coached well, and that again not only inspires loyalty, but it inspires people to do their best work, and you know if you’re being coached and you blow it, it’s okay because he’s not going to ding you over the head. He’s going to say, ‘Okay, so you blew that one. Let’s get up and do it again.’”<sup>143</sup>

Perhaps the most interesting aspect of Portch’s management style was that direct reports and presidents consistently used the word “fun” in describing working with him and noted that he had a very good sense of humor. “Except for the fact that he didn’t know how to have us not work all the time, he was a lot of fun to work with,” said Jim Muyskens.<sup>144</sup> “We had a lot of... I started to say fun, and Steve would have said fun because that was another one of his key words,” said Bremer. “And I’m a grim workaholic, so this was always something I needed to hear.”<sup>145</sup> “He was absolutely charming and very funny,” said Hanes. “I mean, he had a wonderful sense of humor, which made even the hardest work quite [laughs] bearable, enjoyable.”<sup>146</sup> “He could laugh at himself,” recounted President Nesbitt, reflecting on her year as Portch’s special assistant. “I mean, I just remember being in the office and hearing him laugh.... He could see the humor in situations.”<sup>147</sup>

For fun, Portch even created a system office basketball team he called the Runnin’ Regents. Bremer recounted:

He had the Runnin’ Regents... and he would make a lot of fun about the Runnin’ Regents and talk about the Runnin’ Regents. He was playing, literally playing with people in that case, playing basketball, but playing with people.... And he understood the importance of social occasions, and he would make sure those

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<sup>142</sup> Bremer, interview.

<sup>143</sup> Kettlewell, interview.

<sup>144</sup> Muyskens, interview.

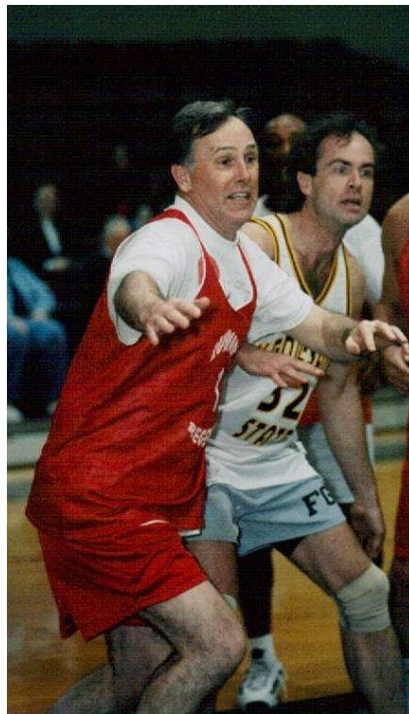
<sup>145</sup> Bremer, interview.

<sup>146</sup> Hanes, interview.

<sup>147</sup> Nesbitt, interview.

things happened, and just the jokes along the way, the light heartedness even when things were really serious underneath it all.<sup>148</sup>

The irony of the Runnin' Regents was that it was Portch's mechanism for making fun of himself and his role as chancellor. The team would play against teams of administrators and staff members at the institutions, and Portch always played to win. Moreover, he always received the MVP award before the game. "He wasn't a basketball player at all. He needs to stick to fox hunting, but he just could not lose, and it was a joke, and we all knew he was going to win," said President Skinner. "He still was incredibly competitive, and we all laughed, and it was good, and it was fun and everything, but you could tell it meant a lot to him to win, and I'm convinced if we had the Georgia Tech basketball team out there, he would have still fought just as hard, but he's fiercely competitive."<sup>149</sup>



Portch in play.

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<sup>148</sup> Bremer, interview.

<sup>149</sup> Skinner, interview.

Although Portch certainly could not select his own board, he and many others noted that the board of regents at the time was a very committed board. “The overall board leadership was strong,” said Lindsay Desrochers. “They were very compatible with the Governor. They understood the Governor’s agenda.”<sup>150</sup> President Skinner stated, “There were just a bunch of regents who were ready for someone to put together a compelling piece of reasoning that harnessed their dreams of what Georgia can be, and so, it was a great, great marriage, and Steve accorded them a lot of respect, a lot of respect.”<sup>151</sup> In fact, Portch considered the regents “partners in the enterprise.”<sup>152</sup>

“I was very blessed with the chairs I got,” said Portch, and he worked very closely with them.<sup>153</sup> The chair of the board during Portch’s first year and the development of the strategic plan was Regent Donald M. Leebern, Jr., a wealthy liquor distributor and former quarterback for the University of Georgia who had been appointed to the board by Governor Zell Miller in 1991. Just as Portch did not micromanage his staff and presidents, Leebern did not micromanage him. Portch recounted:

Leebern trusts professionals.... He’s going to ask good questions, but he’s going to be 100% supportive of the professionals as long as you give him the good reasons. He’s awesomely generous with his time and willingness to come around the state with me and make some of that 34 [campus visits] in 100 days possible. He came with me to Albany, gave it every minute. Every minute I asked for, I got, plus some from him. So, I was very fortunate that first year in that he does not micromanage. If I’d had a micromanaging chair in that first year, I could not have pulled this off. He wanted the big picture and wanted confidence. He knew what we were doing and where we were going, as long as you gave him that. So I was tremendously blessed that first year.<sup>154</sup>

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<sup>150</sup> Desrochers, interview.

<sup>151</sup> Skinner, interview.

<sup>152</sup> Portch, interview.

<sup>153</sup> Ibid.

<sup>154</sup> Ibid.

By all accounts, Regent Leebern trusted Portch completely and was always exceedingly generous with his time and his assets. James recalled, “[Leebern] said to Steve, your job is to figure out where to take the system. My job is to sign the checks.”<sup>155</sup>

In Portch’s second year, the board chair was Regent Juanita Powell Baranco, the first African-American woman to serve in that capacity. Appointed with Leebern by Governor Miller, Baranco was a prominent lawyer and business woman who had previously served on the Georgia Board of Education from 1985 to 1991.<sup>156</sup> She stated that the governor appointed her to the Board of Regents to facilitate educational transitions to the system.<sup>157</sup> The same age as Portch, Baranco described them as “fast friends” and “kindred spirits.”<sup>158</sup> She was very focused during the implementation phase of the plan and was particularly involved in marketing it. President Skinner characterized Baranco as “lyrical.”<sup>159</sup> She said, “We did a dog and pony show during my tenure as board chair. We went all over this country; we did interviews with this, that, and the third.”<sup>160</sup> Portch stated:

As it turned out, Juanita was ideal for the second year because, in terms of implementation, she’s all about getting the job done. As long as you tee up what the job is and when it’s got to be done, she can rise to that occasion. She could walk into a meeting and get you from A to B. That’s what she was able to do for us. She really kept us on target, and again, I could not have been more blessed with how that turned out. Those first two years were so critical to the strategic plan. I won’t say that it was on autopilot after that, but the first two years were the absolutely key elements. And again, Juanita gave me plenty of room and time to do what I had to do.<sup>161</sup>

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<sup>155</sup> James, interview.

<sup>156</sup> Mrs. Juanita Powell Baranco, Chair, Board of Trustees, Clark Atlanta University, [http://www.cau.edu/gen\\_info/gen\\_info\\_bio\\_baranco.html](http://www.cau.edu/gen_info/gen_info_bio_baranco.html) (accessed June 13, 2008).

<sup>157</sup> Baranco, interview.

<sup>158</sup> Ibid.

<sup>159</sup> Skinner, interview.

<sup>160</sup> Baranco, interview.

<sup>161</sup> Portch, interview.



The minutes of his first board meeting stated, “In his strategy for improvement, Dr. Portch pledged to ‘reduce the amount of paper... and increase the emphasis on broad policy development and good communication.’ He pointed out that too often governing boards are ‘squidged... drowned in the ink of minutia,’ which, in turn, invites micromanagement.”<sup>162</sup> Even though they were his superiors, Portch in some ways managed the regents. Lindsay Desrochers stated, “He was very effective at managing the board.... He knew his role; he knew the role that he thought they should play.”<sup>163</sup> He directed the regents away from system office and campus operations and raised them up to the level of systemwide policy development. Annie Hunt Burriss stated:

I think he’s extraordinary in his understanding of how to manage a board.... From all other observations of the board, [prior to Portch’s appointment] it was very fractioned and they were getting into business that they shouldn’t have gotten into. He lifted them up and had them on a governing board basis where they were thinking about policy. He lifted them up out of the petty fray and the ticky-tacky stuff and began over time to make them think holistically and think as leaders. He led them to become leaders where they thought about a system, and if you can pull people higher up and work for the greater good, then they’re going to make wiser decisions. Because down here, they’re going to get petty, they’re going to get political, they’re going to get ego-driven, and any time a decision is ego-based, it’s flawed.<sup>164</sup>

Leebern and Baranco both supported Portch in his efforts to keep the regents’ focus on higher-level governance issues. In an interview for *Black Issues on Higher Education*, Baranco was quoted as saying, “[We] are really a policy making board. We do not have – and I refuse to have – a hands-on relationship with the staff. My job is to make sure that we have a Chancellor who is competent and to make sure that he is hiring competent people. Once that is done, they are the experts. We’re just citizens.”<sup>165</sup> Portch also kept

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<sup>162</sup> Minutes, 1994-1995, 37.

<sup>163</sup> Desrochers, interview.

<sup>164</sup> Burriss, interview.

<sup>165</sup> “Georgia’s HOPE.”

the regents focused on the system as a whole and not their individual districts or institutions. As with the presidents, he worked to make them think of the entire system rather than its various parts, and he tried to depoliticize matters as much as possible. Regent Baranco noted, “I had to [remind the regents that] you don’t just represent that particular region of the state. You represent everybody, and you have to make decisions that are good for the whole, not just for your particular constituency.”<sup>166</sup>

One of the ways Portch kept the regents focused at the system level was by engaging them in the larger issues that would inform the creation of the strategic plan. The very foundation of the strategic plan was that it had to be the board’s plan. The regents had to own it. President Skinner said:

Portch kept us, kept all of the presidents fully apprised, but I would say to you that my impression was that Steve was determined that the strategic plan be something that the regents themselves fully embraced and owned as their own.... It was very clear to me that he understood very well the governance system of a multicampus higher education public system. He understood that very well, and he was determined to make that plan something that the regents really bought into fully. I was asked at various times to suggest some things, but I was always struck by the fact that he wanted this to be the regents.’<sup>167</sup>

“Before he came, I don’t think the board was really engaged,” said President Nesbitt.

“They might get engaged on a particular issue, but he really tried to engage them in the overall development of the system. You know, where do we want to go? And I think that was really important.”<sup>168</sup> Of course, much of this engagement was initiated at the Jolley Lodge strategic planning retreat through the collective brainstorming exercises that were the genesis of the strategic plan. Regent McMillan recounted:

Unlike previous attempts at strategic plans... we had much more involvement.... Now, obviously, we did not put the finishing touches on it. We had maximum

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<sup>166</sup> Baranco, interview.

<sup>167</sup> Skinner, interview.

<sup>168</sup> Nesbitt, interview.

input from day one. First of all, we agreed that it needed to be done, and there was a good deal of consensus building, if you will. That was, some compromising along the way, because some regents felt strongly about some things and others felt strongly about other things.<sup>169</sup>

Portch stated, “I had a genuine respect for the value that they could add, particularly in areas of finance and facilities, where many of them had proven their own success in knowing how to do those things. I felt we could always learn from that. I expected in return a respect for our knowledge of the academic part of the enterprise, and I always got that.”<sup>170</sup>

One of the ways Portch engaged the regents was by educating them about the academic part of the enterprise. The first several months of the teacher preparation initiative, for example, were informational sessions creating a picture of the teacher education landscape in preparation of board action. It wasn’t until the fifth month that the board even considered proposed principles, and even then, they were invited to participate in their fine-tuning. It was very much an educational and participatory experience. Wagner recounted:

Watching him with the board, it was like watching a great conductor with a novice orchestra. He had to both explain it and be a kind of conductor of how the process would work, and I used to marvel at the way he did that. He’d walk around the table and talk to them. You can’t talk down to them. After all, you work for them. And he didn’t do that. I don’t mean to say that, but he knew all this stuff, and he had to basically kind of teach them this, and it was extraordinarily impressive, I thought. They ended up having to make decisions about what would be in their plan, literally everything, but he gave them the blueprints and they worked on it, and it was just, in terms of administrative ability, I don’t think I’ve ever seen anybody that good.<sup>171</sup>

The strategic plan was the heart of every board meeting. With fiscal year 1997, the Planning and Oversight Committee became the Strategic Planning Committee, and

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<sup>169</sup> McMillan, interview.

<sup>170</sup> Portch, interview.

<sup>171</sup> Wagner, interview.

for the remainder of Portch's chancellorship, the Strategic Planning Committee would be chaired by Regent Leebern, would meet as a Committee of the Whole, and would be the highlight of the board meeting. As with the teacher preparation initiative, each of the subsequent years of the Portch administration would have a strategic planning theme, and each meeting would connect to the previous and subsequent meetings. The effect was that each new board chair would have a strategic planning focus for his/her term as chair and that theme would flow from one meeting to the next as a collective "incidental learning" experience over the course of the entire fiscal year. "He wanted the regents to see that there was a connection from one board meeting to the next to the next to the next in the essence that sometimes a topic would be introduced at one meeting, and then at the next, it would be discussed, at the next, it would be acted upon," explained Tom Daniel. "And that was a very skillful thing I think because it let more people participate, reduced the surprise element, and it was a very skillful form of communication in that we were sending out signals to our constituencies about where we were going."<sup>172</sup> President Skinner stated, "I always said, 'Hey, this is like graduate seminar,' because they were informed.... He did not talk down to them in my experience, but he really did engage them intellectually."<sup>173</sup> Baranco added:

When he says something, he's not afraid to say it at a level where you can understand it.... He will break it down so that the average person can really understand it without being insulting.... None of that misplaced arrogance is there with Stephen. He is putting it out there where you can understand it and his rationale is there.<sup>174</sup>

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<sup>172</sup> Daniel, interview.

<sup>173</sup> Skinner, interview.

<sup>174</sup> Baranco, interview.

“He knew how much they could absorb, and he knew what kind of stuff they could absorb, and to try to bore them or distract them doesn’t work,” said Wagner. “They’re too smart for that, and other chancellors have tried to do that, and it’s been their undoing.”<sup>175</sup> Rick Sutton added, “He was not a person who believed in sugar-coating topics or hiding things from them, and his willingness to put things forward in a clear and forthright fashion was one of the things that they learned to respect.”<sup>176</sup> Regent Leebern remarked, “When Stephen talked, I took notes... because he was on top of it.... I quote him all the time and give him credit for it.”<sup>177</sup>

Portch also engaged the regents by keeping communications open as he did with the presidents. In addition to “feedback loops,” phone calls, and faxes, Portch made certain that all regents were individually consulted prior to making any decisions. “Once I got the [senior vice chancellors] team in place, we were able to divvy up briefing regents,” he said. “We worked very hard at briefing regents between meetings so they were not surprised and so we could get their ideas before finalizing policy. So once I was able to share that responsibility, we were able to push the agenda pretty aggressively forward.”<sup>178</sup> Weber stated, “I don’t think there was ever a regent who got annoyed at him because he always was right there. I don’t think anybody was ever blindsided, and that’s what they hated more than anything else.”<sup>179</sup> This strategy also helped to resolve issues with the regents before there was ever any public discussion. “Nothing was left to chance. He choreographed,” explained Jim Muyskens. “He had either himself or one of the three of us [senior vice chancellors] meet with every board member before a board meeting....

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<sup>175</sup> Wagner, interview.

<sup>176</sup> Sutton, interview.

<sup>177</sup> Leebern, interview.

<sup>178</sup> Portch, interview.

<sup>179</sup> Weber, interview.

So we would bring all these people on board before you ever came to a board meeting.”<sup>180</sup> Bill Bowes remarked:

I think Portch was not interested in having a lot of debate about policy issues. He wanted ... to say here's the policy, we want to go ahead with it. You know, we need to kind of grease the rails here to make that happen. If it was not going to happen, if it was going to create some turmoil, then more often than not, it would not ever appear on the board agenda.<sup>181</sup>

Clearly, Portch did not like surprises, which was why after the admissions policy incident at the May 1995 board meeting, he would change the way he handled all future items to be presented for board action. “Well, that was, I think, a wise cautionary note,” he said, “And it led us to the adopt-ratify process to give us not two more years to think about something, but 30 days or maybe 60 days between presenting something and then finally ratifying it.”<sup>182</sup>

Perhaps the most innovative way in which Portch avoided surprises and moved the strategic plan forward was the way he choreographed meetings, particularly board meetings. James explained, “Frankly, what you want by the time you get to the theatre that is a regents’ meeting is to be sure that you are bringing things that the regents are going to act positively on.”<sup>183</sup> Similarly, Art Dunning said, “So when they got to the meeting, he had communicated, he had given attention, he answered questions, so the board meetings were symbolic decisions rather than anxious discussions.”<sup>184</sup> While Weber managed every detail of board meeting logistics and the staff collaboratively developed the agendas, Portch introduced something new to the process, the dry run, which was effectively a dress rehearsal of the board meeting. John Millsaps stated:

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<sup>180</sup> Muyskens, interview.

<sup>181</sup> Bowes, interview.

<sup>182</sup> Portch, interview.

<sup>183</sup> James, interview.

<sup>184</sup> Dunning, interview.

Everything was very carefully scripted and orchestrated. He did all the advance work upfront with the regents. He made sure that everything was settled before they even sat down or the gavel was rung. No hair was ever out of place. It was a very controlled environment.<sup>185</sup>

In fact, Bremer and Portch (and later, Weber) would draft bullet points for the regents as simple scripts for the board meeting to get them from one presentation to another to facilitate the flow of the meeting. “Now, Steve and I did call it scripting,” recalled Bremer. “I think he was again playing to the English professor in me.”<sup>186</sup>

Although the primary purpose of dry run meetings was to avoid the element of surprise, the meetings had other benefits. Portch explained:

Dry run for me had three purposes.... Priority one was to strengthen board meetings, to have board meetings be as effective and as efficient as they possibly could be. Number two, I thought it was a wonderful way to have professional development for the staff.... And third, it was a way to have some fun, bring people together and play roles as certain regents and so on. We did serious work, as I used to say, but we shouldn’t take ourselves too seriously.<sup>187</sup>

In terms of the first purpose, Portch was very interested in the presentations and the presenters themselves. He did not want presenters to simply read from their PowerPoint slides, nor did he want them to bore the regents with long, dry presentations. “One of his favorite words was ‘crisp,’” said President Nesbitt. “He wanted the presentations to be crisp, to the point, and people really prepared.”<sup>188</sup> Tom Daniel explained, “He was very interested in the time it took to make the presentations. He wanted them to be quickly paced and lively, and he didn’t mind if they were out of the norm or incorporated some attention getting activity as long as that activity didn’t overshadow the content.”<sup>189</sup>

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<sup>185</sup> Millsaps, interview.

<sup>186</sup> Bremer, interview.

<sup>187</sup> Portch, interview.

<sup>188</sup> Nesbitt, interview.

<sup>189</sup> Daniel, interview.

Portch's motto when it came to presentations was "Leave them wanting more."<sup>190</sup> He wanted them to be interesting but short and to the point, primarily because he valued the regents' time. After all, the regents were typically very powerful business people for whom time was a very valuable commodity. "He smartly figured out this was a board of business people," said Annie Hunt Burriss. "...Time is money to them. I'd better get it right."<sup>191</sup> "What I saw in that – in both the dry runs and the way the board meetings were run – was the ultimate respect for the board members," said Linda Daniels.<sup>192</sup>

Portch did not just want sleek presentations, however. He wanted the presentations to be entertaining and informative. To that end, he invited many guest speakers to participate. He did not have James present the implementation plans for the policy directives. Rather, he had those who chaired the systemwide taskforces make those presentations. "They're doing the work; they ought to present it," he said. "Also, the board gets to see the depth of our talent and how many people were involved. We exist for our institutions, and our institutions are full of incredibly talented people.... So that was particularly key in the implementation phase."<sup>193</sup> Once the board embarked on the yearlong strategic planning foci of the implementation phase, the chancellor would invite national experts in the subject matter or people in the field to give their perspectives to the regents. For example, when the board was learning about teacher preparation issues, he would invite teachers and school superintendents to speak on their experiences in the classroom and the realm of P-12 education.

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<sup>190</sup> Daniel, interview; Nickel, interview.

<sup>191</sup> Burriss, interview.

<sup>192</sup> Daniels, interview.

<sup>193</sup> Portch, interview.



With regard to professional development, there were at least two primary ways in which dry runs served this purpose. Obviously, they made staff members and presidents better presenters and public speakers, but also, they provided an excellent opportunity for team building, collective brainstorming, and again, fun. “I got crucified a number of times,” said Annie Hunt Burriss on rehearsing presentations. “They were great growth opportunities.”<sup>194</sup> Ron Henry recalled, “I can remember being asked some difficult questions, which was good because that then primed me for what the regents might ask.”<sup>195</sup> Moreover, Portch solicited feedback on his own presentations. Randall Thursby recounted:

In dry runs, he wanted us to ask questions. This is one the things he said: ‘Try to ask questions that will trip me up.’ ... He wanted us to try to ask questions to trip him up, and I thought that was brilliant on his part. That was really brilliant because we could come at him from a lot of different directions, and we knew where the traps were. We knew the bad things or the potential problems on what he was going to say.<sup>196</sup>

This is why participation and collective brainstorming was important. Dry runs were not the purview of senior vice chancellors alone. Rather, they included broad representation from the various departments in the system office. Annie Hunt Burriss recalled:

You had Cathie Mayes Hudson, who’s steeped in great statistical nuances. You had facilities people, architectural, engineering. You had the finance people oriented in money. You had the policy people. You had the political people. You had the public relations people. Everybody was looking at what you were doing through a Mayo Clinic experience.... You got a holistic exposure. So you got a lot of good questions asked and you got the message tightened down.<sup>197</sup>

This was beneficial not only for the sake of the board meeting, but also for the sake of the staff. As with his “swat teams,” Portch would include people in dry run based not on their

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<sup>194</sup> Burriss, interview.

<sup>195</sup> Henry, interview.

<sup>196</sup> Thursby, interview.

<sup>197</sup> Burriss, interview.

titles, but on their areas of expertise, and this created a certain synergy across the divisions. Rick Sutton remarked:

It *did* create a sense of teamwork, which is a very difficult thing to do in a system office, difficult to do anywhere. It gave everybody, regardless of their different responsibilities, an occasion every month where you came together and were working on a common review of the entire agenda, and so everybody felt that they had a part in that. And he wasn't terribly hierarchical about it. It wasn't like only senior staff could come and do this. Pretty much everybody in the academic affairs realm was part of that discussion.<sup>198</sup>

Not only did the staff members represent their own departments in the dry run exercise, but they also tried to anticipate the concerns of the regents. Arlethia Perry-Johnson recounted:

We would go so far as to even have mock regents, knowing the predispositions and propensities of certain regents for the type of questions they would ask, whether they would be big picture or micro level questions. Then, [the chancellor] would get people to wear that regent's hat and to ask that line of questioning so that we could anticipate and not be in a scenario where we could not be immediately responsive on a given issue that a regent might want to address. So it made for extremely cohesive, succinct, and tight board meetings.<sup>199</sup>

"And that's the way to run a board meeting," said Shelley Nickel. "That way, you don't have gaps, you don't have mistakes, you don't have glitches with technology.... You try to get all of the kinks out before... it's show time. It's exactly theatre."<sup>200</sup>

Portch would also employ dry runs to prepare for budget presentations to the governor and the legislature. In fact, he liked to use a lot of props for legislative presentations in particular. He explained:

The appropriations committee presentation was always prop and gimmick laden for two reasons. One is the legislators came to expect it and looked forward to it because things were pretty dull and dry otherwise. Number two, we always were given a long time. The more time we could use with our props, the less time we

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<sup>198</sup> Sutton, interview.

<sup>199</sup> Perry-Johnson, interview.

<sup>200</sup> Nickel, interview.

had to get cornered on some difficult question that was perhaps not directly related to appropriations.<sup>201</sup>

Another strategy Portch used in board meetings, but more so even in his budget presentations, was what he called “putting a human face” on things. He explained:

Now, I don’t want to just put a human face and not have the data behind it, but you take a PREP student in front of the legislature when you’re talking about PREP. You take a young man from Albany whose parents were both drug addicts, both have been in and out of prison, and the kid had overcome every obstacle that had been thrown in front of him. PREP had certainly helped him, but the kid himself was the real story. We took two or three PREP students, one who had a death in the family and her family couldn’t afford a telephone, so there was no one to call.... Another time, in a presentation to the Governor – the best gimmicks you don’t set up, they bring themselves – but the [Governor] said something about how nice a student looked, and she said, “Well, our family has no money, so I don’t ever get new clothes, but when the other students heard I was going to speak to the Governor, they all chipped in and bought me this dress.” That’s why I wanted the human face on it. [laughs] You can’t pretend. You can’t fool people with that. That’s real, and I wanted people to see this is what we’re trying to do. We’re trying to bring education to somebody to open up new opportunities to them. By golly, they’re doing a tremendous amount themselves, but they need a hand to get over the line. So that was the human face we tried to always put on things.<sup>202</sup>

Bill Bowes recounted:

He always had a knack of bringing in the right people to make that presentation. You know, too, it was a sense of theatre. What can I say? It was a show. He didn’t just go up there and talk about, you know, here’s our budget request and go line by line, line by line, but really presented it in a very different way.... One of the things that Steve Portch always talked about was putting a human face on things. It was a very big thing with him. So if we were talking about a very specific program, he would not discuss it in the context, ‘Well, here’s a program.’ He would bring up a person – a student, a parent, a teacher, whomever – to come up and talk about that, and that gave the legislature, you know, hey, here’s somebody who’s directly benefited from that program or here’s somebody who’s come out of that program, who you know we can look at.... I mean, that was the way Steve Portch handled things. It was putting on shows, putting a human face on everything that we did rather than presenting it to the legislature in a very dry fashion.<sup>203</sup>

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<sup>201</sup> Portch, interview.

<sup>202</sup> Ibid.

<sup>203</sup> Bowes, interview.

In general, this approach to legislative budget presentations was very effective. Of Portch's very first legislative budget presentation, Regent Baranco recalled, "By god, if he didn't get a standing ovation from the General Assembly! They applauded him because he knows his stuff."<sup>204</sup>

As stated in the introduction, a 1999 study published by the National Center for Public Policy and Higher Education depicted Portch as highly regarded by the legislature due to his strategic communications, particularly his implementation of an annual accountability report. "One of the things that Steve Porch was very good at was saying to the members of the general assembly, I don't expect you to leave the money on the stump and run," said Tom Daniel. "We will tell you how we're using the money, we will report back to you, and that in essence was how the accountability report was born."<sup>205</sup> Portch also consistently tied the budget request to the strategic plan. "He really understood that the strategic plan and budgeting have to be one and the same," stated Jim Muyskens. "If your budgeting doesn't reflect the strategic plan, you don't really have a plan."<sup>206</sup>

Governor Barnes, who was in the House of Representatives before he became Governor in 1998, recalled:

Here's what I liked about his budget presentations. [Portch said,] 'Here's what I want, and here's what I can do with it.' I have listened to enough budget presentations, both as Governor and as a legislator, I could fill up a warehouse.... A lot of the department heads would come in and say, 'I need this money,' but they really don't have clear ideas of what they want to do with it. This guy always did.<sup>207</sup>

During Governor Miller's administration, the university system was generously funded in large part due to the fact that the board's agenda was very much aligned with

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<sup>204</sup> Baranco, interview.

<sup>205</sup> Daniel, interview.

<sup>206</sup> Muyskens, interview.

<sup>207</sup> Barnes, interview.

the Governor's. In fact, Miller said the appointment of Portch as Chancellor was "the best thing that has happened to my administration."<sup>208</sup> Miller and Portch certainly had a rapport. In a hand-written letter dated May 6, 1997, in which he was thanking the Governor for giving him a copy of *Corps Values*, Portch wrote, "... I am intrigued by lists, and your list of values has really had me thinking. Our backgrounds are so different (mine: middle-class, English, child of the late 60's) yet our values are remarkably similar."<sup>209</sup> Shelley Nickel, who first worked in the Governor's Office of Planning and Budget before being hired as Budget Director for the University System of Georgia, recounted:

I tell this story all the time about how people have budget hearings with the Governor, and they come in the room with the Governor. You know, it's usually a pretty stiff meeting. And in the case of Steve Portch, Zell Miller got up out of his chair, went to the door to greet him, shook his hand and said, "Chancellor, I've so been looking forward to this." That had never happened any other time that I was in the room. No governor looks forward to a budget hearing with a department head, but he wanted to hear what Steve Portch's ideas were and what he was thinking about and how he was going to change the system. It was a really exciting time. I didn't have to sell too much [in my role as the Governor's analyst] because they had such a good relationship, and I think the Governor trusted Steve Portch, that his ideas were right for the system. And so the funding came sort of naturally after he sold the idea to the Governor.<sup>210</sup>

"So you had another just serendipitous relationship develop between the two of them," said Wagner. "And what that meant was Miller was ready to do almost anything that Portch and the board wanted to do."<sup>211</sup> Steve Wrigley, who was Governor Miller's Chief of Staff, stated:

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<sup>208</sup> Hyatt, 314.

<sup>209</sup> Letter to Governor Zell Miller from Stephen R. Portch, May 6, 1997. This document is in storage at the University System Office in the Chancellor's Office files in a file marked "Governor Miller." A copy of this document is in the author's possession.

<sup>210</sup> Nickel, interview.

<sup>211</sup> Wagner, interview.

Steve was very good because he knew how to be appropriately deferential, which is important when you are in a position like that because you're not elected but you're dealing with the chief elected person in the state. And in a state like Georgia, that person has a lot of formal power, and there are some people, particularly unfortunately in higher ed, who sometimes forget that they're not an elected official. And Portch was really very good about being able to say his piece, lay out what he thought was important, establish what he felt like the priorities should be, but always recognizing that the governor was ultimately the decider, and ultimately the elected official. Steve was really very good at merging all of that, which made him really valuable because clearly, he was a higher ed leader, and he was able to be an advocate for higher ed, be an advocate for approaches maybe that sometimes we didn't agree with necessarily, that the governor wasn't necessarily comfortable with or didn't like, but he was good at doing it in such a way that he was deferential to the legitimate authority of an elected official.... He played a very important role in that he was somebody who offered straightforward advice.<sup>212</sup>

Because Portch and Miller were so closely aligned in their vision for the system and the state, others often assumed they had a close friendship. However, according to Portch, his private meetings with Governor Miller were generally very short and to the point. "If I added up all the hours I actually talked with [Governor Miller] one-on-one, it would be a handful," said Portch. "I mean, it was just no-nonsense. You could take his word to the bank."<sup>213</sup> In an undated hand-written letter to the Governor, Portch wrote, "I love doing business with you – it's intellectually stimulating yet concrete and direct."<sup>214</sup>

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<sup>212</sup> Wrigley, interview.

<sup>213</sup> Portch, interview.

<sup>214</sup> Letter to Governor Zell Miller from Stephen R. Portch, undated. This document is in storage at the University System Office in the Chancellor's Office files in a file marked "Governor Miller." A copy of this document is in the author's possession.



Governor Zell Miller, Senior Vice Chancellor James and Mrs. Alda Muyskens, Chancellor Stephen R. Portch

Chancellor Portch worked much harder in his relationship with Governor Roy Barnes. He recounted:

I thoroughly enjoyed my relationship with Roy Barnes. It was a very different relationship. I spent much, much more time with Barnes. Miller was not a lot interested in debating ideas. He wanted good ideas, and he wanted to know how to get them done, and he got them done. Barnes was a litigator, and he loved debate. He absolutely welcomed very straightforward advice, and I felt perfectly free to give him strong advice, and he felt perfectly free to give me strong advice, and I thoroughly enjoyed his intellect and his capacity to grasp ideas and his command of the details.<sup>215</sup>

Similarly, Barnes thought very highly of Portch. He said, “Zell had poured money to him, and I did, too, because we knew that this guy could produce.”<sup>216</sup> He described their relationship as follows:

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<sup>215</sup> Ibid.

<sup>216</sup> Barnes, interview.

[Portch is] like a little imp. You can tell by looking at him that he's got devilment in him. I'm mischievous myself, and we fed off each other.... He was always a step ahead of you thinking. We'd have games of trying to see who could run each other down. It was not a normal relationship.... We were always kidding each other and exchanging ideas.... He had a perfect personality for rough and tumble politics.<sup>217</sup>

It was fortunate for Portch that Barnes liked him, because for the remainder of his service as chancellor, he would need the governor's support. "As long as Zell Miller was there and he had that type of relationship with the governor, he could get by," said Randall Thursby. "But as soon as Miller left, he was exposed. That's my opinion."<sup>218</sup> Indeed, this was an opinion shared by many.<sup>219</sup>

Although Portch enjoyed a very strong relationship with the legislature during the Miller administration, over the course of his chancellorship, his relationship with some legislators soured. In spite of his efforts to keep the legislature informed, he had in effect deliberately depoliticized a lot of the policy making at the system level. By expecting the presidents to come together to "speak with one voice" and not go to their particular legislators, Portch had changed the political dynamic, perhaps leaving some legislators feeling somewhat disenfranchised. Representative Coleman remarked, "If you expect to get money from the legislature, the least they ever ask for is open communications."<sup>220</sup> There was also the perception that the system was being unfairly funded. Tom Daniel explained:

Don't forget that there's built-in tensions between the governor and the general assembly. That's a built-in tension. As the governor displayed more and more support for public higher education, there were times where members of the general assembly would say to me, the university system is getting everything it wants and 'blank' isn't. You were talking about the shifting resources, or you

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<sup>217</sup> Ibid.

<sup>218</sup> Thursby, interview.

<sup>219</sup> Clough, interview; Weber, interview; Morgan, interview.

<sup>220</sup> Coleman, interview.



were talking about a disproportionate share of the new resources being directed to the university system. But by and large, their reaction was positive because Steve Portch was delivering.<sup>221</sup>

By most accounts, there were also tensions between Governor Miller and Speaker of the House Tom Murphy. Miller and Murphy had historically been at odds, according to some interviewees, who also noted that Representative Terry Coleman was very close to Speaker Murphy. Representative Larry Walker stated, “I thought [Portch’s] big problem, if he had a problem, and he *did* have a problem, he had a problem with Murphy. I thought that was his problem more than Terry.”<sup>222</sup> Representative Walker liked Chancellor Portch, but he did not think Speaker Murphy was enamored. He said:

Chancellor Portch had a keen intellect and a great sense of humor, and I think, you know, most people appreciated his sense of humor. Maybe some people did not. But I thought he apparently had a very good relationship with the governor, and I thought he generally had a good relationship with the legislature, although he and Tom Murphy were oil and water to some extent, just to be honest about it. I don’t think he ever had a real good relationship with Speaker Murphy, who is a vital force in Georgia politics, was probably *the* force in Georgia politics.<sup>223</sup>

In addition to the political tensions inherent in the Portch’s relationship with Murphy because of his affiliation with Governor Miller, there was also a difference of personalities between the two. Portch used humor to deflect and disarm, and apparently, Speaker Murphy did not appreciate his sense of humor. According to Representative Walker:

One thing I learned early on about Mr. Murphy, you didn’t tease him very much. He wasn’t a man that took a lot of teasing and kidding, and especially, you didn’t kid him unless you were in his inner circle and knew when to do it, and I don’t think Chancellor Portch ever really learned that to be honest with you. I think he tried to kid him and be light with him when that was probably a good way with 90% of the people, but that wasn’t necessarily a good way with Mr. Murphy.<sup>224</sup>

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<sup>221</sup> Daniel, interview.

<sup>222</sup> Larry Walker, interview by author, telephone, August 23, 2007.

<sup>223</sup> Ibid.

<sup>224</sup> Ibid.

However, Portch had only positive things to say about Speaker Murphy. He said:

We might have fussed at one another, but you could take his word to the bank. If you went in to him and said, ‘I need this. I’m telling you this is very important for the people of this state. Trust me.’ I really didn’t do that very often. PREP was probably going to go under in the House budget until I walked over and said that to him. PREP was back in the budget the next day and stayed the whole way through. So his strength, though he was a character and all that – as I say, we fussed at each other a lot – when I needed Tom Murphy, Tom Murphy was always there.<sup>225</sup>

Though Speaker Murphy may have been in the background of the legislative tensions, it was always Representative Coleman who was at the fore. John Fuchko was Chair of the Student Advisory Council at the time of the January 2000 budget presentation to the joint appropriations committee during which Portch had to defend semester conversion and ask that the system be held harmless for its negative effect on the funding formula. Portch asked him to attend the presentation, and when Representative Coleman asked the chancellor about semester conversion, instead of answering the question himself, Portch asked Fuchko to respond. Fuchko recounted:

The chancellor basically just decided he wasn’t going to answer it. He was going to have John Fuchko, who is one of our students and the Chair of the Student Advisory Council, who went through semester conversion, come up and answer this question, which needless to say, I couldn’t answer.... So I more or less talked about, as a student, whether it was positive or negative and that sort of thing. I think I said it was generally positive. I personally and the students I know didn’t have much of an issue with it.<sup>226</sup>

Interestingly, in spite of their differences of opinion on particular strategic initiatives and decisions, even Representative Coleman ultimately expressed positive feelings for Portch. “I like Steve, and I think he was a great administrator. I just disagreed with two or three of his major efforts – semester system and more of an elitist attitude toward [college

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<sup>225</sup> Portch, interview.

<sup>226</sup> Fuchko, interview.

admissions standards],” said Coleman. “I think that Portch was a timely, good leader for the university system.”<sup>227</sup> Similarly, Portch expressed positive feelings for Representative Coleman:

Terry Coleman at the end of the day supported nearly all of our initiatives. Things like GALILEO he very actively supported. He particularly liked to fuss at us because it was one way of getting at the Governor. He also liked to fuss at us because we didn’t give him the one thing he most wanted. We gave him something better, in my view, but we didn’t give him the one thing he wanted. He wanted engineering at Georgia Southern. We think Georgia Tech is premier because we haven’t diluted those resources. .... But it wasn’t anywhere near as bad as people made it out. I mean, I stayed at his home overnight. He’s been in my house several times for dinner. So, the public presentation of it was a little different than the press presentation of it.<sup>228</sup>

Governor Barnes perhaps summed it up best:

There’s just a natural amount of griping from legislators, and you just have to expect it, and you can’t let it get you down, and it never got Portch down. Portch considered it to be a grand game, dealing with the legislature. He would get chewed out...I’ve seen him in appropriations, Terry and all of them, chewing him out... and he’d just stand there and not say a word and walk outside and be laughing. He understood this game.<sup>229</sup>

When it comes to Portch’s leadership style, it is somewhat difficult to differentiate his leadership from his management. Portch was a very strong manager, and that certainly contributed to his effectiveness as a leader. In terms of management, he was able to assemble an effective leadership team and delegate authority to his team members. He was also able to coordinate 34 presidents into a cohesive group that “spoke with one voice” in the legislative budget process. He was even able to manage his regents to some extent by the skillful way in which he orchestrated board meetings. When asked about his leadership style, many responded with answers that interwove management

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<sup>227</sup> Coleman, interview.

<sup>228</sup> Portch, interview.

<sup>229</sup> Barnes, interview.

with leadership. However, Portch did not get caught up in management alone. Governor Miller wrote:

Portch is one of those agency heads you don't worry about – he's smart, he works with you, he challenges you when you need it, but when you make a decision he busts his tail to get it done well. I appreciated that about him, the fact that I could count on him to lift us higher and bring me good ideas and make my ideas better. A lot of governing is managing problems. You can get bogged down in doing so. Portch worked the problems but never let it be an anchor – he was able to keep his head up and keep moving forward with ideas and energy.<sup>230</sup>

Indeed ideas and energy were two very key components to Portch's leadership style, and again, by leadership, I mean to emphasize that he had a destination in the vision that he laid out for the system, and he had people who wanted to follow him on the journey.

Portch had a vision for the University System of Georgia, and he was able to effectively communicate that vision to others. Many characterized Portch as "visionary" and noted that he was able to focus at the very highest level and see how all of the pieces of the plan worked together. "He always knew where he wanted to go," said Regent Baranco. "He knew where he wanted to end up."<sup>231</sup> President Clough remarked, "Steve had a good understanding of things at the 40,000-foot level, and he tended not to worry too much about a lot of the details, and that was his strength. He could think strategically."<sup>232</sup> Tom Daniel stated, "In my opinion, he saw things clearly, and whether that's a gift or a skill, to be able to see things clearly is a plus.... To be able to see a little bit further was also a leadership characteristic. What we needed, and what served us extremely well at that point in time, was to see a little bit further down the road."<sup>233</sup> John Millsaps stated:

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<sup>230</sup> Miller, letter.

<sup>231</sup> Baranco, interview.

<sup>232</sup> Clough, interview.

<sup>233</sup> Daniel, interview.

He articulated a very clear set of things that he wanted to get done, and he tied those together. They weren't stand-alone items. They fit together. Semester conversion supported curriculum revision supported higher academic standards. You know, all those things did have a fit. They just weren't things to do. They were things that all built toward a stronger system.<sup>234</sup>

Sid Bremer remarked, "One of the things I enjoy about working with Steve is how the pieces fall into place as we go along because the overall direction and goal are well perceived."<sup>235</sup>

Not only could Portch communicate his vision, but he was able to get others to believe in it. "The board of regents embraced it and were able to take it forward," said Regent Leebern. "There's a lot of difference between enacting a vision and then taking that vision into reality. Stephen has an innate ability and the charm and the knowledge, number one, to be able to do that for higher education."<sup>236</sup> Indeed, Portch's knowledge and intelligence played a significant role in bringing people along. The majority of interviewees stated that he was one of the most intelligent people they had ever met. "He really was... one of the smartest people I have ever known, so he often saw where things were going before anybody else did," said Jim Muyskens. "He was really a visionary. He did not spend time, as far as I can tell, figuring out how you're going to do it. He had other people to do that."<sup>237</sup> Annie Hunt Burris stated, "He's got a high IQ, he's got a high emotional IQ, and he loves challenges."<sup>238</sup> John Fuchko described him as "highly intelligent, if not brilliant, as far as just understanding all of the dynamics and issues around him."<sup>239</sup> James said, "He brings people along partially by being brilliant and

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<sup>234</sup> Millsaps, interview.

<sup>235</sup> Bremer, interview.

<sup>236</sup> Leebern, interview.

<sup>237</sup> Muyskens, interview.

<sup>238</sup> Burris, interview.

<sup>239</sup> Fuchko, interview.

enthusiastic about what he believes in.... There's something about him. He's not as wide-eyed and he doesn't seem as quite as naïve, but there is a little bit of the Tony Blair in Steve, or maybe there a little Steve in Tony Blair.<sup>240</sup> McEver also saw a special combination of brilliance and enthusiasm in Portch that similarly reminded him of a popular political figure:

He was a wonderful communicator.... He is a naturally charming and motivating kind of guy.... I used to compare him with Bill Clinton.... You have to be politically charismatic in order to get elected, and if you happen to be a brilliant policy mind as well, well that's just gravy. But it's so rare that those two things happen to be put together in one person, and with President Clinton, you had that. You had somebody that had a brilliant policy mind, but he also was brilliant with people.... I don't think I'm going to see anybody in my lifetime who has that combination. In a lot of ways, Chancellor Portch was like that.<sup>241</sup>

Many also cited integrity as one of Portch's greatest strengths and another reason they believed in his vision. President Clough said, "I think Steve had good principles, and he had good integrity."<sup>242</sup> Bremer remarked, "I trusted him...I knew that his sense of values in education were in line with my own."<sup>243</sup> Governor Barnes recounted, "His style was one of persuasion, rather than threats or anything else. He was going to convince you that it was the right thing to do. Then, he was going to shame you into doing the right thing."<sup>244</sup> Several interviewees noted that Portch was motivated primarily by what he perceived as being right for the system. Regent Leebern said, "Stephen Portch makes the decision based upon what is right for the system."<sup>245</sup> Rick Skinner stated, "I always felt

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<sup>240</sup> James, interview.

<sup>241</sup> McEver, interview.

<sup>242</sup> Clough, interview.

<sup>243</sup> Bremer, interview.

<sup>244</sup> Barnes, interview.

<sup>245</sup> Leebern, interview.

that he really was thinking about Georgia, was thinking about people in Georgia.”<sup>246</sup>

Regent Baranco remarked:

He’s not doing it for self-aggrandizement or self-fulfillment.... He’s not on an ego trip at all. He really is on a mission to make a better education system in higher education, to get it to the highest level it can be. He is on that mission. He lives and breathes it, and that’s refreshing.<sup>247</sup>

Because people were convinced that Portch’s vision was right for the system, they wanted to help make it a reality. Randall Thursby remarked, “There was no way that he could implement those types of changes without... not only really being a strong leader, but also being perceived as a strong leader.”<sup>248</sup> “He was master persuader,” said Jim Muyskens, and certainly, Portch made the regents believe that the strategic plan was their own. “Please believe me, you’re going to walk away thinking you made a decision,” said Regent Baranco, “And you end up most of the time doing exactly what he wanted done.”<sup>249</sup> Regent Leebern stated, “At the end of the day, his thoughts and his dreams and aspirations you buy into it, and you think it’s yours. That’s Stephen Portch.”<sup>250</sup> Secretary Weber noted, “He always gave credit to the regents. They had plenty of ideas, but he refined them, and they went back as their ideas, and they believed it because the raw material was theirs with input from his.”<sup>251</sup>

Just as Portch had involved the regents in the creation of the vision that would ultimately become the strategic plan, he was also able to make others across the system take ownership of the strategic plan by listening to them and genuinely involving them in

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<sup>246</sup> Skinner, interview.

<sup>247</sup> Baranco, interview.

<sup>248</sup> Thursby, interview.

<sup>249</sup> Baranco, interview.

<sup>250</sup> Leebern, interview.

<sup>251</sup> Weber, interview.

the implementation process. In that regard, many interviewees used the word “inclusive” in describing Portch’s leadership style. Tom Daniel stated:

To bring about that massive amount of effort he had to mobilize the team, and to me, another part of his leadership style which I think may have been under-appreciated was his ability and willingness to be inclusive. His expectations were pretty simple. You could participate if you would get in there and work hard, roll up your sleeves and work hard and not worry about who got the credit, if you were motivated by the results or the common good, not necessarily the results for the selfish good.<sup>252</sup>

Portch did not create just one team, though. He fostered team-building at every level. He expected his senior vice chancellors to build teams, and he expected his presidents to build teams. He also encouraged collaboration across the system. Everything he did fostered inclusion and cooperation from the administration to the students. “My strongest memories from working with Chancellor Portch were that he was such an inclusive decision-maker,” said Jimmie McEver. “I mean, at the end of the day, the buck stopped at his desk. He and the board made the decision, but he wanted to make sure that he heard from all of the different stakeholders who were associated with different policy choices.”<sup>253</sup> McEver also noted that Portch went out of his way to include students in the process.<sup>254</sup> Regent Leebern remarked that Portch “could bring diverse groups with no similar background together for a common cause.”<sup>255</sup> President Lord remarked:

It was that people were inspired with his leadership. He valued people. He let you know that he valued you and what you did. It was not lip service. He understood the academic enterprise. He understood how to build collegial relationships and that you did so by empowering people to be part of the decision and part of the discussion. Instead of telling them the way it was going to be, you let them be part of it. These initiatives did not get borne by his laying them out. The idea came

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<sup>252</sup> Daniel, interview.

<sup>253</sup> McEver, interview.

<sup>254</sup> Ibid.

<sup>255</sup> Leebern, interview.



from him, but then the flesh on the bones was the product of all these policy directions.<sup>256</sup>

In fact, Portch encouraged others to bring ideas to the table. “Chancellor Portch just always really appreciated people thinking outside the box, coming up with new ideas, and he would try to give them room, and I think that was part of his strength,” said President Nesbitt. James said, “How he gets to his decision is much more inclusive and much more like team work, I think, than what you see in at least many of the administrators I worked with, so I think there is an openness. He has a very strong ego which allows him to be able to hear other viewpoints that may not always be consistent with him.”<sup>257</sup> Rick Sutton stated:

He is the most brilliant administrator I’ve ever seen. He has his flaws, but he has an excellent ability to stay focused on a vision. He has an ability to bring people with him, particularly those that were under him. He inspires people to do their best. He’s sensitive to them as individuals.<sup>258</sup>

Madlyn Hanes remarked, “He was effective because he enabled and empowered [others] so that at any given time it became everyone’s project.”<sup>259</sup> In her journal, Bremer wrote, “I am a player in an important process.... I think I can really enjoy this work, and Steve helps me feel free to work.”<sup>260</sup>

Portch also nurtured people’s aspirations of what the system could be and where the vision could take them. Art Dunning remarked:

We have a catch-up mentality in the South at times.... Portch’s language didn’t even capture any of that. He was saying, ‘Let’s exceed the [nation].’ I had not heard anybody talk about it that way. I’ve heard people [say,]... ‘We’ve got to get to where Wisconsin is. We’ve got to get where New York is. We’ve got to get to where Ohio is.’ He didn’t even utter a single word of that sort, of what I call

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<sup>256</sup> Lord, interview.

<sup>257</sup> James, interview.

<sup>258</sup> Sutton, interview.

<sup>259</sup> Hanes, interview.

<sup>260</sup> Bremer, interview.

historic tradition language of this region which is catch-up language. He had leap-over language. I thought, this is intriguing.<sup>261</sup>

Portch was able to create excitement about the plan. “Steve Portch was a very upbeat kind of person, and by and large, people were infected with his enthusiasm. That’s great, and that’s what I believe a leader should be,” said President Sethna. “One of the things you need to do is motivate, to create, to engender that enthusiasm, and he did that. He did that very well, and he did that for the strategic plan as well.”<sup>262</sup> President DePaolo noted, “There was suddenly a pride in what was happening, in what could happen.”<sup>263</sup> Randall Thursby stated, “People would follow him. They would believe in what he wanted to get done, particularly in the early years.”<sup>264</sup> Most people noted an air of excitement about the strategic plan. Sharon James recounted:

I mean, it was really a fun time to be there. It was very exciting. It was very exciting because of what was going on in the system and all of this incredible energy, and I think, a really hopeful vision about where things could go and how education at all levels could improve in Georgia.... It’s probably, when I think about that year, my most exciting experience ever having been in higher education, exhausting, but real fun.<sup>265</sup>

By engaging people in the work of the plan and creating an air of aspiration, Portch inspired them to work together toward the common good. “I think in terms of personal satisfaction, that was a very good time for many of us, just in terms of how we felt about work, how we felt about the integrity of what we did, the usefulness of it. We felt that our efforts made a difference,” said Cathie Mayes Hudson.<sup>266</sup> “He never made a move without a reason, and that’s why we were so willing to work, work, work, work,”

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<sup>261</sup> Dunning, interview.

<sup>262</sup> Sethna, interview.

<sup>263</sup> DePaolo, interview.

<sup>264</sup> Thursby, interview.

<sup>265</sup> James, interview.

<sup>266</sup> Hudson, interview.

said Secretary Weber. “You’d never have missed work. Those of us who knew him best, we would have walked on glass for him.”<sup>267</sup> James also said:

I do think that he is incredibly good at getting people to work very hard for him.... He uses you as a tool to get something done that he wants to get done, but the things he’s trying to get done are not necessarily just for him. I mean, I think that he does have principles that he operates with. I mean, clearly there are some things here that he really and truly believed in.<sup>268</sup>

However, Portch always gave credit where credit was due. “Most of the ideas were mine, and they went as far and as deep as about one sentence,” he said, “Then, some very bright, capable people turned a snippet of an idea into something pretty real.”<sup>269</sup>

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<sup>267</sup> Weber, interview.

<sup>268</sup> James, interview.

<sup>269</sup> Portch, interview.

## CHAPTER SEVEN: CONCLUSION

At the Board of Regents meeting held on May 9, 2001, Chancellor Portch officially announced his intention to step down as Chancellor of the Board of Regents of the University System of Georgia once a new chancellor was in place.<sup>1</sup> However, he had notified Chair Glenn S. White and Vice Chair Hilton H. Howell III a year prior to this announcement, and he had submitted a six-page, hand-written notification letter to Governor Roy Barnes on May 7, 2001. Barnes instructed his Chief of Staff, Bobby Kahn, to talk to former Governor and then Regent Joe Frank Harris to try to convince Portch to stay.<sup>2</sup> “I begged him not to go,” said Barnes, “He was determined.”<sup>3</sup>

In both his official announcement and his letter to the Governor, Portch explained that when he was interviewed for the position of Chancellor of the University System of Georgia, he had told the board that the next chancellor should be “a strong and activist change agent” and, as such, should serve between five and seven years.<sup>4</sup> He also explained that with the full implementation of the new admissions standards in fall 2001, the board’s 1994 strategic plan would be completely implemented by the time he left. In fact, on the day prior to his official announcement, he had facilitated yet another strategic

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<sup>1</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia Held at 270 Washington St., S.W., Atlanta, Georgia, May 9, 2001, <http://www.usg.edu/regents/minutes/2001/may01.phtml> (accessed September 19, 2008).

<sup>2</sup> Bill Shipp, “Goodbye Chancellor Portch,” *The Valdosta Daily Times* (May 13, 2001).

<sup>3</sup> Barnes, interview.

<sup>4</sup> Minutes, May 2001. Letter to “Roy” from “Steve,” May 7, 2001. This document is in storage at the University System Office in the Chancellor’s Office files in a folder marked “Chancellor: Compensation Issues.” A copy of this document is in the author’s possession.

planning retreat for the Board of Regents at the Jolley Lodge, and before he left office, he would lead the regents through the process of developing a strategic plan for 2002-2007.<sup>5</sup> While Governor Barnes wanted Portch to stay on, others expressed that his timing was perfect. “He stepped down at the right time,” stated Art Dunning. “His timing was exquisite.”<sup>6</sup> Rick Sutton also said, “He never initiates anything without an exit strategy.... His sense of timing is great.”<sup>7</sup>

Indeed, Portch’s departure was as much a part of his overall plan as any of the strategic directives. Knowing his intentions, his original three Senior Vice Chancellors already had moved on to other positions. In October 1999, Jim Muyskens became Chief Executive Officer/Dean of Faculty of the Gwinnett University Center.<sup>8</sup> In July 2000, Art Dunning became Vice President for Public Service and Outreach at the University of Georgia.<sup>9</sup> In August 2000, Lindsay Desrochers became Vice Chancellor for Administration at the University of California Merced.<sup>10</sup> Linda Daniels remarked:

I think probably as interesting as the way he built his leadership team was his transitional exiting with his leadership team. You get the impression they were all very smart people, and they saw the strategy and this window that he had carved out for himself as his optimum period of being effective, and those people I think left with a level of respect and decorum. I mean, they left on their own terms. Some stayed in the system, some transitioned out, but there was I think as organized and positive of an exiting of leadership and a transition of the talent in place as he left.<sup>11</sup>

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<sup>5</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia Held at 270 Washington St., S.W., Atlanta, Georgia, August 7 and 8, 2001, <http://www.usg.edu/regents/minutes/2001/aug01.phtml> (accessed on September 19, 2008).

<sup>6</sup> Dunning, interview.

<sup>7</sup> Sutton, interview.

<sup>8</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia held at 270 Washington St., S.W., Atlanta, Georgia, October 12 and 13, 1999. <http://www.usg.edu/regents/minutes/1999/oct99.phtml> (accessed September 19, 2008). Note, Muyskens has since become President of Queens College in New York (Arenson).

<sup>9</sup> Dunning, bio.

<sup>10</sup> Desrochers, resume. A copy of this document is in the author’s possession. Note, she is currently Vice President for Finance and Administration, Portland State University, Oregon.

<sup>11</sup> Daniels, interview.

In June 2000, Portch named Dr. Daniel S. Papp the Senior Vice Chancellor for Academic Affairs.<sup>12</sup> An international affairs expert, Papp had served in numerous leadership capacities in the system and had most recently directed educational programs for Yamacraw, Governor Barnes' initiative to attract broadband and microchip industries to the State of Georgia.<sup>13</sup> In October 2000, Portch reorganized the University System Office, moving fiscal affairs under the leadership of Papp and renaming the division the Office of Academics and Fiscal Affairs.<sup>14</sup> "I thought that was a brilliant move," remarked Rick Sutton. "He sent the message that the budget is subordinate to the academic mission of the institution, and I thought that was a great message to send."<sup>15</sup> He also created the Office of External Activities and Facilities, promoting Tom Daniel to Interim Senior Vice Chancellor over that division. Additionally, he created the Office of Support Services, promoting Corlis Cummings to the position of Interim Senior Vice Chancellor over that division. Cummings previously served as Assistant Vice Chancellor for Legal Affairs (Contracts).<sup>16</sup>

At the October 2000 board meeting, the three new Senior Vice Chancellors introduced themselves to the board and discussed the new organization. Together, they used the analogy of a bridge to describe the new office structure, while foreshadowing the transition from one chancellorship to another. In closing, Papp offered their "pledge of renewed dedication to working together and with [the regents] to build the bridges to

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<sup>12</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia Held at 270 Washington St., S.W., Atlanta, Georgia, June 13 and 14, 2000, <http://www.usg.edu/regents/minutes/2000/june00.phtml> (accessed September 19, 2008).

<sup>13</sup> Ibid.

<sup>14</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia Held at South Georgia College, Douglas, Georgia, October 10 and 11, 2000 <http://www.usg.edu/regents/minutes/2000/oct00.phtml> (accessed September 19, 2008).

<sup>15</sup> Sutton, interview.

<sup>16</sup> Cummings would later serve as Interim Chancellor between the subsequent chancellorships of Thomas C. Meredith and Erroll B. Davis, Jr.

create a more educated Georgia,” also foreshadowing what would become the key theme of the next strategic plan – “creating a more educated Georgia.”<sup>17</sup> Portch also promoted Shelley Nickel from Budget Director to Special Assistant to the Chancellor with primary responsibility for helping craft a new plan that was largely a continuation of the 1994 plan.<sup>18</sup> In August 2001, the Board of Regents adopted a new vision statement, a revised mission statement, and 11 supporting goals as part of its review and revision of a strategic plan for the system. The board’s new focus, as stated in its new vision statement, would be on “creating a more educated Georgia,” a tag line that appears on University System of Georgia communications to this day.<sup>19</sup>

Chancellor Portch delivered his final State of the System address at the November 2001 board meeting. Of the reorganization in particular, he said, “The University System Office has never been stronger. We have a good blend of experience and new faces, a wonderful team dedicated to this Board, to this System, and to our institutions. It’s a team that’s a working example of how diversity and quality can and should be intentional and coincidental core values.”<sup>20</sup> Also in his final address to the board, Portch highlighted the successes of the admissions policy directive, which he considered to be the cornerstone of his chancellorship. With regard to admissions in particular, he entreated, “I implore you to be unyielding on the basic principles of quality and rigor.”<sup>21</sup> Portch further stated that the University System of Georgia was stronger than ever before because the mission review process had fostered distinctiveness among institutions and the semester

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<sup>17</sup> Minutes, October 2000.

<sup>18</sup> Governor Barnes would subsequently appoint Nickel President of the Georgia Student Finance Commission, and Governor Sonny Perdue would appoint her the first female Director of the Governor’s Office of Planning and Budget.

<sup>19</sup> Minutes, August 2001.

<sup>20</sup> Minutes, November 2001.

<sup>21</sup> Ibid.

conversion process had fostered broad curricular revision and reduced time to degree. Moreover, the practice of “speaking with one voice” in the legislative budget process had produced very positive results. Portch reported, “We have a record capital investment – \$1.1 billion since we began the strategic plan – strong support for special initiatives (\$676 million for 23 special funding initiatives in the period [fiscal year 1995 to fiscal year 2002]); salary increases of 35.5% since [fiscal year 1996] and a total budget increase of 57%.”<sup>22</sup> Again, Portch implored the regents to continue along these lines, saying:

These three points of progress – distinctive missions, semesters, and speaking with one voice – need to be maintained. Let me be clear about this. The Board’s resolve on raising admission standards, preventing mission creep, and changes of so-called status – and a disciplined legislative approach – may well be tested during a transition, whether by politicians, chambers of commerce, or even university presidents. Yet, these are the very foundations of our success and must be protected.<sup>23</sup>

While Portch touched on these obviously critical aspects of the strategic plan, his focus was squarely on the heart of the original plan – access to academic excellence. He stated:

We simply cannot let our quality slide. The focus has been on quality. Admission standards. Research productivity. Our buildings. Our technology. And yes, I hope (with a little help from “dry runs”), the quality of Board meetings. There’s no substitute for discipline and professionalism. They are sources of quality. This System must, must, put quality first. There are those who grumble that we’re on a wild goose chase. There are those who would settle for the way things used to be. There are those who, frankly, don’t believe we should strive to be among the very best. They are our purveyors of mediocrity. They are the voices that are blind to the tyranny of low expectations.<sup>24</sup>

Chancellor Portch concluded his remarks on a highly motivational note:

Let me end by paraphrasing Governor Carl Sanders. What he said about a legal education, immortalized on the wall at UGA’s law school, can now be expanded to any form of college education in Georgia: “The people of Georgia want and deserve nothing short of the best. The University System of Georgia, then, must be of such excellence that no citizen of Georgia need ever leave this state because

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<sup>22</sup> Ibid.

<sup>23</sup> Ibid.

<sup>24</sup> Ibid.



a superior education is available elsewhere.” That has been my mantra and the mantra of so many state leaders. It must not just be the mantra of the moment. It must be the mantra of the future. We owe no less than that to our children and our grandchildren.<sup>25</sup>

Portch did everything in his power to ensure that the plan he had implemented would be the foundation for the future direction of the University System of Georgia. Moreover, as Eliot did not remove himself entirely from Harvard, neither did Portch remove himself entirely from the University System of Georgia.<sup>26</sup> Instead, he remained on the system’s payroll for four years in the position of Chancellor Emeritus and Policy Advisor to the Board, Chancellor, and Presidents. In a letter dated August 7, 2001, Immediate Past Chair White and Chair Howell wrote, “Your specific duties will be mutually determined by you, the new Chancellor and the Board and may include assisting with the transition, providing policy advice, and facilitating Board of Regents strategic planning and problem solving, and other assignments as mutually agreed upon.”<sup>27</sup>

On September 11, 2001, as the World Trade Center’s Twin Towers fell, the Board of Regents interviewed the man who would ultimately replace Portch as Chancellor: Thomas C. Meredith, then Chancellor of the University of Alabama System. September 11 was also Chancellor Portch’s fifty-first birthday, and a there was to be a black-tie retirement event in his honor at the Governor’s Mansion that night. Obviously, the celebration was postponed, and from that day forward, the nation and the University System of Georgia would never be the same.

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<sup>25</sup> Ibid.

<sup>26</sup> Hawkins, 290. Following his retirement in 1909, from 1910 to 1916, Eliot served as a member of the Harvard Board of Overseers, a more consultative than administrative role.

<sup>27</sup> Letter to Stephen R. Portch, Chancellor, from Glenn S. White, Immediate Past Chair, and Hilton H. Howell, Jr. (sic), Chairman, August 7, 2001. This document is on file in storage at the University System Office in the Chancellor’s Office files in a folder marked “Chancellor: Compensation Issues.” A copy of this letter is in the author’s possession.

A seasoned higher education administrator and a native Southerner, Chancellor Meredith inherited a reorganized system office and a new strategic plan that was deeply rooted in the 1994 strategic plan, as well as responsibility for continuing the momentum of that plan. “When I hear conversations about Dr. Meredith, he generally is not referred to as a change agent,” stated current Chancellor Erroll B. Davis Jr. “In fact, sometimes there are suggestions that he was dedicated to the status quo. I was not here, and I don’t know what charge he was given by the board. Thus, I can only relate the impressions I have been given.”<sup>28</sup> There was some conflict in his chancellorship, including arguments with Governors Barnes and Perdue over tuition hikes and public tensions with the regents themselves over compensation agreements.<sup>29</sup> There was also a public power struggle with the University of Georgia Foundation over President Michael Adams’ decision not to renew the contract of Athletic Director Vince Dooley, a struggle that ultimately ended with the Board of Regents instructing the University of Georgia to sever ties with the foundation.<sup>30</sup>

Meredith did not seek the counsel of Chancellor Emeritus Portch, and the potential for continued strategic change dissipated.<sup>31</sup> Mission creep renewed when the Gwinnett University Center became the University System of Georgia’s thirty-fifth institution, the first four-year college to be created in the system in over a century. Jim Muyskens remarked, “Once I left, that dream [of a high-tech inter-institutional

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<sup>28</sup> Davis, interview, edited per further communication, October 10, 2008.

<sup>29</sup> Jennifer Moore and Brandon Larrabee, “University of Georgia System Chief Steps Down,” *Athens Banner Herald* (July 22, 2005) accessed via EBSCOhost on September 19, 2008.

<sup>30</sup> Minutes of the Special Meeting of the Board of Regents of the University System of Georgia Held at 270 Washington St., S.W., Atlanta, Georgia, on May 25, 2004, <http://www.usg.edu/regents/minutes/2004/may2504.phtml> (accessed on September 19, 2008).

<sup>31</sup> Dennis A. Gioia and James B. Thomas, “Sensemaking During Strategic Change in Academia,” *Organization and Governance in Higher Education*, M. Christopher Brown II, Ed., Fifth Edition, ASHE Reader Series (Boston: Pearson Custom Publishing, 2000), 371.

collaboration that could meet educational and workforce needs on an as-needed basis] just sort of went away and the people in the county who wanted their own institution won out.”<sup>32</sup> The 2001 admissions standards were also changed during the Meredith administration when, in 2005, the SAT/ACT requirement for admission to a two-year or state college was dropped.<sup>33</sup>

In 2004, Meredith threatened to take a position in Tennessee because he felt the regents had not met certain financial obligations, causing a division in the board.<sup>34</sup> Meredith also angered Governor Perdue when he proposed an unprecedented, midyear tuition increase in response to the Governor’s request for more budget cuts from state agencies.<sup>35</sup> The Meredith chancellorship ultimately ended in July 2005 when he announced his intention to take the position of Higher Education Commissioner in Mississippi.<sup>36</sup> His resignation followed months of public speculation that he would be leaving, speculation encouraged by two-hour executive session meetings of the board at each of the April and May 2005 board meetings to consider his reappointment.<sup>37</sup> Meredith has since retired from the Mississippi Institutions of Higher Learning amid controversy that he received landscaping at his private residence from state dollars.<sup>38</sup>

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<sup>32</sup> Muyskens, interview.

<sup>33</sup> Minutes, May 2005.

<sup>34</sup> Moore and Larrabee.

<sup>35</sup> “Georgia Regents Pick First Black Woman as Interim Chancellor,” *Issues in Higher Education*, vol. 22, issue 14 (September 8, 2005), 10.

<sup>36</sup> Moore and Larrabee.

<sup>37</sup> Brian Basinger, “Regents Chairman Denies Chancellor Resignation Afoot,” *Savannah Morning News* (April 25, 2005) accessed via EBSCOhost on September 27, 2008. See also Minutes, April 2005 and May 2005.

<sup>38</sup> Elizabeth Crisp, “Meredith Retiring Amid Controversy,” *Clarion Ledger* (October 23, 2008), <http://www.clarionledger.com/apps/pbcs.dll/article?AID=/200810230100/NEWS/810230384> (accessed October 23, 2008).

On December 8, 2005, the Board of Regents appointed Erroll B. Davis Jr. the eleventh Chancellor of the University System of Georgia.<sup>39</sup> In addition to having served as a member of the Board of Regents of the University of Wisconsin System from 1987 to 1994, Davis also served as Chair of the Board of Trustees of Carnegie Mellon University and is a life member of that board. He is also on the Board of Trustees of the University of Chicago.<sup>40</sup> It is worth noting that Chancellor Davis is the first African-American Chancellor of the Board of Regents.<sup>41</sup> However, what is perhaps more intriguing is the fact that he comes to the position from a non-academic route. Davis's career experience and credentials are more in line with those of the regents he serves than a traditional higher education leader. He earned a bachelor of science in electrical engineering from Carnegie Mellon University in 1965, and a master of business administration in finance from the University of Chicago in 1967.<sup>42</sup> His first career path was in the energy industry, from which he retired in July 2005 as President and Chief Executive Officer of Alliant Energy Corporation.<sup>43</sup>

Dan Papp, who was also a finalist for the chancellorship, left his position in the University System Office after he was appointed President of Kennesaw State University in February 2006, leaving the position of chief academic officer vacant and arguably

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<sup>39</sup> Minutes of the Special Meeting of the Board of Regents of the University System of Georgia Held at 270 Washington St., S.W., Atlanta, Georgia, December 8, 2005, [http://www.usg.edu/regents/minutes/2005/dec120805\\_special.phtml](http://www.usg.edu/regents/minutes/2005/dec120805_special.phtml) (accessed September 19, 2008).

<sup>40</sup> Biography of Erroll B. Davis Jr., University System of Georgia, <http://www.usg.edu/chancellor/bio/> (accessed September 19, 2008).

<sup>41</sup> Note, Corlis Cummings, who served as Interim Chancellor between the Meredith and Davis administrations, is also African-American.

<sup>42</sup> Davis, biography.

<sup>43</sup> Ibid.

beginning the new chancellorship with an academic Achilles heel.<sup>44</sup> President Beheruz N. Sethna of the University of West Georgia filled the vacancy on an interim capacity, followed by President Lisa A. Rossbacher of Southern Polytechnic State University. An extended search for a permanent chief academic officer finally concluded with the appointment of Susan Herbst, who became Executive Vice Chancellor and Chief Academic Officer on November 1, 2007.<sup>45</sup> Herbst came to the University System of Georgia with 18 years of faculty and higher education administrative experience.

Prior to her appointment, however, and without a standing chief academic officer, the Board of Regents already had adopted a new strategic plan in August 2007. The plan has six broad overarching goals touching on the issues of undergraduate education, increasing enrollment capacity, research and economic development, collaboration with educational partners, affordability, and efficiency.<sup>46</sup> Following the adoption of the new strategic plan, Chancellor Davis brought Shelley Nickel back to the University System Office to lead in its implementation, and I am assisting her in the effort. Like the 1994 strategic plan, the current strategic plan is focused on the system as a whole, and Chancellor Davis has renewed the system focus through the establishment of a dozen systemwide presidential projects. However, the issues and especially the economy of today are dramatically different than in 1994. As Georgia's population grows and its demographics change, the new plan grapples with how to provide access to an anticipated

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<sup>44</sup> Minutes of the Special Meeting of the Board of Regents of the University System of Georgia Held by Conference Call, February 16, 2006, [http://www.usg.edu/regents/minutes/2006/feb06\\_special.phtml](http://www.usg.edu/regents/minutes/2006/feb06_special.phtml) (accessed September 19, 2008).

<sup>45</sup> "Dr. Susan Herbst Named New Chief Academic Officer of the University System of Georgia," News Release, September 10, 2007, <http://www.usg.edu/news/2007/091007.phtml> (accessed on September 19, 2008).

<sup>46</sup> Minutes of the Meeting of the Board of Regents of the University System of Georgia Held at 270 Washington St., S.W., Atlanta, Georgia, August 7 and 8, 2007, <http://www.usg.edu/regents/minutes/2007/aug07min.pdf> (accessed on September 19, 2008).

100,000 additional students by 2010. It also has an ambitious and noble goal of providing need-based financial aid, but it is uncertain whether this is feasible in this economic climate. Though the theme of “creating a more educated Georgia” persists, it does not offer the specific goal of “access to academic excellence.” Moreover, the implementation of the new plan’s various strategies may be greatly adversely affected by projected budget cuts of at least 6% and as much as 10% this year alone. It remains to be seen whether the 2007 strategic plan will be successful in the short or long term.

What then remains of the 1994 strategic plan? The Office of P-16 Initiatives has been extremely successful in attracting external funding to the University System of Georgia. Since its inception, the Office of P-16 Initiatives has leveraged almost \$74 million in grant monies.<sup>47</sup> Although its programs and strategies have evolved, the P-16 initiative’s own history and accomplishments, particularly those of the teacher preparation initiative, would be a worthy topic for additional research. Most interviewees cited the P-16 initiative, including PREP, as one of the greatest successes of the Portch administration. Most importantly, the P-16 initiative paved the way for collaboration among educational agencies. Annie Hunt Burriss remarked, “He lifted up the whole world of education in Georgia.”<sup>48</sup>

Moreover, the lasting effect on individuals involved in the PREP initiative is immeasurable. In a recent editorial to *The Atlanta Journal-Constitution*, Devin Releford claimed to be “saved right on time” by the program.<sup>49</sup> Releford was born in 1983 to drug-addicted parents and, by his own account, grew up under considerable socio-economic

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<sup>47</sup> Funds Received 1996-2007 Updated March 2007. This document was provided by and is on file with the Office of P-16 Initiatives, University System Office, Atlanta, Georgia. A copy of this document is in the author’s possession.

<sup>48</sup> Burriss, interview.

<sup>49</sup> Devin Releford, “Life Gave Me a Script; I Rewrote It,” *The Atlanta Journal-Constitution* (June 9, 2008).

and environmental pressures. He attended the PREP program at Atlanta Metropolitan College from 1997 to 2000, where he said he learned “that dreams of one day being successful could become a reality.”<sup>50</sup> He further stated, “Attending PREP on weekends was my escape and made a strong impact on how I viewed my future.”<sup>51</sup> Releford went on to attend college at the University of Tennessee in Knoxville, where he volunteered in various programs to mentor underprivileged youths like himself. Releford currently resides in Atlanta and wrote the opinion piece to encourage others to participate in mentoring programs like PREP. He concluded, “It is imperative that all Atlantans, including young adults like myself, step up and assume responsibility for the rescue of the next generation of our youth.... It is an arduous task, but one that reaps lasting rewards for those of us who take it on.”<sup>52</sup> While PREP no longer exists in its original form, the system continues to pursue avenues of early intervention for encouraging the inclusion of students in at-risk situations and the legacy of PREP lives on in the students whose lives the program touched.

In addition to P-16, many interviewees also cited economic development as one of the lasting innovations of the era. In fact, Fincher wrote, “Perhaps the most daring or ambitious initiative of the University System’s strategic plan is ICAPP: Georgia’s Intellectual Capital Partnership Program.”<sup>53</sup> Indeed, economic development – and by extension, ICAPP – was a part of the larger strategic plan, but it was not the main thrust of the plan. Unlike the strategic initiatives discussed in Chapter Four, economic development was a reactive and political initiative, not a proactive and strategic initiative.

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<sup>50</sup> Ibid.

<sup>51</sup> Ibid.

<sup>52</sup> Ibid.

<sup>53</sup> Fincher, 142.

While this dissertation did not delve into that area of the strategic plan, it would nevertheless be a fruitful topic of further research. Portch established the first Office of Development & Economic Services as well as the first Office of International Education at the system level, and both of these offices still exist, have their fair share of accomplishments, and are worthy of further examination. Although the budget office no longer resides under the auspices of academic affairs, remnants of the structure Portch established at the University System Office and in the system as a whole remains. Tom Daniel stated, “He laid a strong foundation, and if you look at where the system has continued to go after his tenure, I think you have to come to the conclusion that he took the system as he found it, made it better, and left it better than he found it, and left it in good shape for the people to come after him.”<sup>54</sup>

Perhaps the most important legacy of the Portch administration is in the immeasurable difference the strategic plan made in the perception of the University System of Georgia both from within and without. Every person interviewed for this dissertation without exception believed that the strategic plan was a success. “In the end, we pretty much came together and presented what I think was a first-rate document that has stood the test of time; you know, in many ways, much of it is still around,” said Regent McMillan.<sup>55</sup> “When I look at Georgia as a state and Georgia’s system of higher education, where it was when he got here, where it had been, and where it is now, the trajectory that he set it on and the momentum with which it moved forward didn’t just end when he walked out of that office, but in fact, that momentum, that trajectory was solid enough and right enough that we continued along that path even after his absence,”

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<sup>54</sup> Daniel, interview.

<sup>55</sup> McMillan, interview.



said Linda Daniels.<sup>56</sup> “It made a statement, and it set a direction, and whether you got to the end of the road or not, you were definitely moving in the right direction,” said Rick Sutton. “That’s what he was able to do, and he used that strategic plan brilliantly I think to provide that focus.”<sup>57</sup> President Nesbitt stated, “He did more in the period he was here than in the last fifty years of the system. There were a lot of things that needed to be done, and he did them.”<sup>58</sup> David Morgan observed, “[The plan] was probably more successful than most because it was implemented, and a lot of times, strategic plans get interrupted by leadership changes or recessions or ennui or boredom or having enough, but Portch stayed on task and pushed things through, and so I think it was successful.... I give him high marks for getting it done.”<sup>59</sup> Even Portch’s harshest critic, Terry Coleman, said, “I think he changed the perception of the university system for the better.... I thought he was refreshing, good for the university system.”<sup>60</sup>

Indeed, the University System of Georgia enjoyed increased national visibility and respect during the Portch administration. In 1998, *Change, The Magazine for Higher Learning* identified Portch as one of the nation’s 21 most influential higher education leaders.<sup>61</sup> The article stated, “With all the recent attention to Georgia’s Hope Scholarship plan, and the general reinvigoration of higher education in Georgia, Portch has emerged as a visible spokesperson on national policy matters, including technology deployment and school-college linkage.”<sup>62</sup> Moreover, by 2000, Georgia had two public universities – Georgia Institute of Technology and University of Georgia – in the top 20 public

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<sup>56</sup> Daniels, interview.

<sup>57</sup> Sutton, interview.

<sup>58</sup> Nesbitt, interview.

<sup>59</sup> Morgan, interview.

<sup>60</sup> Coleman, interview.

<sup>61</sup> “Leaders from Inside the Academic Community,” *Change*, vol. 30 issue 1 (Jan./Feb. 1998), 15.

<sup>62</sup> Ibid.

universities for the first time in its history.<sup>63</sup> President Nesbitt stated, “The legacy [of the strategic plan] is that, to me, the University of Georgia became a flagship university, and it really frankly had not been.”<sup>64</sup> Arlethia Perry-Johnson stated, “The big picture is that it helped put the system on the national map because we were doing so many cutting-edge policies simultaneously that it made people begin to wonder what on earth was going on in Georgia.”<sup>65</sup>

President DePaolo had worked in the University System of Georgia for 18 years prior to Portch’s administration, but she was at Western Carolina University in North Carolina prior to her appointment as President of Georgia College.<sup>66</sup> She recounted:

I had been from ’75 to ’93 in this very sleepy system [Georgia] where nothing was really going on, and then, I started hearing about Steve. That was the key time of Steve and Zell Miller, and their two agendas were unified and making things happen.... When I came back to the system, what I saw was so stunningly different. It felt different. It was different. In that four years, the system had been transformed.... No one was saying anymore, “Thank god for Mississippi.”<sup>67</sup>

Jim Muyskens recalled, “After I was here a couple of years, I went to a meeting of my counterparts, and two years in a row, I would always be the one who was asked to speak last. It sort of annoyed me until I figured out that was because no one wanted to follow what was happening in Georgia. The strategic plan was the key.”<sup>68</sup> Tom Daniel also said, “There was a period of time there where you started seeing the university system mentioned more in *The Chronicle of Higher Education*, where you had people in the university system being asked to give presentations at national conferences. That was a

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<sup>63</sup> FY 2000 Annual Report of the University System of Georgia, [http://www.usg.edu/usg\\_stats/annual\\_rep/2000/challenge/p18.html](http://www.usg.edu/usg_stats/annual_rep/2000/challenge/p18.html) (accessed October 6, 2008).

<sup>64</sup> Nesbitt, interview.

<sup>65</sup> Perry-Johnson, interview.

<sup>66</sup> Minutes, November 1997.

<sup>67</sup> DePaolo, interview.

<sup>68</sup> Muyskens, interview.

new development. It was a positive and exciting development, and it was rewarding to see the system starting to get some recognition, and he deserves a lot of credit for doing that.”<sup>69</sup> Gail Weber remarked, “It’s now a given that Georgia is very serious about higher education. That can be destroyed, but it hasn’t been. Somehow we went from being nobody to being the talk of the nation on many of those initiatives.... I think that it made us a very serious state in higher education.”<sup>70</sup>

Not only did Portch effectively change the perception of the system from the outside, but he also changed the way people in the system viewed themselves and their work. First and foremost, institutions genuinely began to think of themselves as part of a larger system. Linda Daniels said:

I think, for me, the groundwork that it laid of really thinking of and looking at the system as the whole is greater than the sum of its parts.... The system previously was more of a loose confederation of institutions than a governing board over a *system* of institutions... and I think with the strategic plan, I started to both realize the beauty of the system and what the whole Board of Regents was established back in the ‘30s, you know, what that vision was then. It was almost like that sort of cyclical revival of [the idea that] the system can be and should be and will be greater than the sum of its parts.<sup>71</sup>

Jimmie McEver stated:

Because of his leadership, the strategic plan took a form that was ambitious and feasible and attractive and something that the whole university system could get behind. It really was aimed at not just tweaking things here and there but really at transforming the University System of Georgia into being something that really was more than a collection of 34 independent colleges and universities that just happened to be under the governance of this board. It was an attempt to try to bring those schools together... a system that is more than the sum of its parts. That really was his vision. In my view, that strategic plan was a roadmap for transforming the University System into something that he had a vision for, and I think that in fundamental ways... because of that strategic plan and because of the ambition of some of the initiatives that were in that plan, I think people in the

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<sup>69</sup> Daniel, interview.

<sup>70</sup> Weber, interview.

<sup>71</sup> Daniels, interview.

system and people in the system's colleges started viewing themselves differently. They started viewing themselves with an eye toward the future, with an eye toward well, what is it they want to be and what is the role that they play in this bigger thing and how can the assets that we have on our campus leverage things that are going on on other campuses?... It was one of these things that it wasn't just an administrative strategic plan. It wasn't just a management strategic plan. It was a leadership strategic plan. I think that it in real ways changed the nature of the system.<sup>72</sup>

"I think it came as close probably as the system could at the time of creating an articulated system," said Rick Skinner. "It came close, as close as it probably could get, and by that I mean, for a while, the institutions had a sense of what they were about and where they wanted to go. I think that was lost fairly quickly after Portch departed, and I don't think we have an articulated system now."<sup>73</sup> Indeed, the strength of "speaking with one voice" has diminished over the years. "The way [Portch] operated, his leadership expected us to be less political and not more political," said President Lord. "Today, I find that is completely reversed.... Everybody lobbies."<sup>74</sup>

Portch was able to achieve this sense of a "whole that is greater than the sum of its parts" using his ability to persuade and aspire through the language of the strategic plan and his public speeches. "The written word can be very powerful. It can transcend for thousands of years, and the written word in this case is a living document, and it pulled people up," said Annie Hunt Burriss, adding, "I don't think we've followed it since Steve left, unfortunately."<sup>75</sup> Rick Skinner stated, "Maybe because of his background in teaching literature, he was very, very careful about language. He used language that sort of invoked the better angels of ourselves almost, to quote Lincoln, and

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<sup>72</sup> McEver, interview.

<sup>73</sup> Skinner, interview.

<sup>74</sup> Lord, interview.

<sup>75</sup> Burriss, interview.

he was very careful to do that.”<sup>76</sup> Jimmie McEver also remarked, “The nature of the language was something that you hadn’t really heard before coming out of the chancellor’s office, and I think it’s something that was lost when he left.”<sup>77</sup>

What is not lost, however, is the influence Portch had on those who followed him. Regent Leebern stated, “I’m a better person because I know Steve Portch, and the State of Georgia is better, too.”<sup>78</sup> Many interviewees stated that the Portch administration was the highlight of their careers. “I will always literally cherish the time I worked with him,” said Rick Skinner. “I consider it one of the great honors of my modest career. I wouldn’t give it away for anything.”<sup>79</sup> Linda Daniels said:

You had in the person of Stephen Portch a personality and a momentum and an energy that made you feel that even in a bureaucracy, you can make a difference and you can change things, and that I think has made all the difference in the world in why I stayed in higher education and why I stayed with the Board of Regents. It’s important to make a difference, to feel like you’re making a difference in your career, and the way he approached this job and the mission of education in this state to me was inspiring.<sup>80</sup>

“He’s sort of my hero,” stated President Nesbitt. “He encouraged me to seek a presidential position.”<sup>81</sup> Sid Bremer also stated, “I don’t think I would have dared to become a CEO at UW had it not been for the chance to go to school under Steve.”<sup>82</sup> In fact, many of Portch’s senior staff went on to higher level leadership positions, which is another characteristic of transformational leadership. A transformational leader persuades subordinates to rise above their own self-interests for the benefit of the team, the

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<sup>76</sup> Skinner, interview.

<sup>77</sup> McEver, interview.

<sup>78</sup> Leebern, interview.

<sup>79</sup> Skinner, interview.

<sup>80</sup> Daniels, interview.

<sup>81</sup> Nesbitt, interview.

<sup>82</sup> Bremer, interview. Note, Bremer was appointed Dean and CEO of UW-Marquette in August 1995 and retired in July 2004. <http://www.marquette.uwc.edu/uwmarquette/campushistory.htm> (accessed October 7, 2008).

institution, or society as a whole. As with the LMX model, the transformational leader gives particular attention to subordinates as individuals. The transformational leader identifies what motivates them and engages them fully rather than simply regarding them as a way to accomplish tasks. “The result is a mutual relationship between leaders and followers that may over time convert followers into leaders and may convert leaders into agents for change.”<sup>83</sup>

Throughout his lengthy initial interview, Portch emphasized the role of fate in the success of the 1994 strategic plan. In reflection, he said:

We did raise the standards. We did get the population and policy makers talking about being better prepared. If you read everything today, other states now are reengineering their core curricula, things like that. In some areas, we were behind our times. In other areas, we were ahead of our times. I think it worked out, and others who looked at the strategic plan think it worked out well, but again, all the circumstances, all the stars were aligned for it to do so. They really did. I mean, could you have done that during a recession? Could you have done that with a governor who didn’t have a clue? Could you have done it with a fractured board? A lot of things did align well.<sup>84</sup>

Indeed, those were exceptional times in Georgia. The Portch administration and the 1994 strategic plan benefited tremendously from a strong economy, a supportive legislature, and the excitement and hope inspired by the Olympics. Perhaps most importantly, Portch benefited from having an ally in Governor Miller. Art Dunning stated, “They were an extraordinary force, because of their intellectual ability and force of personality. The two of them [were] very different people but had some of the most common things – high energy, very smart, and action oriented. They just created an energy around higher education that I had not seen anywhere.”<sup>85</sup>

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<sup>83</sup> Bess and Dee, 841.

<sup>84</sup> Portch, interview.

<sup>85</sup> Dunning, interview.

However, it remains to be seen what the true historical impact of that era will hold for the long-term welfare of the University System and the State of Georgia. As Gail Weber said, “It’s going to be a long, long time before we really know what some of these changes have meant. You’re not going to know that when you finish your dissertation.”<sup>86</sup> Indeed, I do not. What I do know is that Chancellor Portch took advantage of a “window of opportunity” to accomplish a great deal in a short period of time, and he did so by developing and, more importantly, sticking to a strategic plan. During the Portch administration, there was a plan that was more than mere rhetoric; it was a living document that was fully implemented. Both ambitious and attainable, the plan was rooted in the shared concerns and aspirations of regents, system administrators, and presidents, but its implementation engaged the faculty, staff, and even students. The 1994 Strategic Plan put the University System of Georgia on notice that it would operate as “a whole that is greater than the sum of its parts,” and during that era, the Chancellor placed systemwide principles over institutional and community politics. The strategic plan put the State of Georgia on notice that public higher education need not be mediocre, that access and excellence were not mutually exclusive. Finally, the strategic plan put the nation on notice that the University System of Georgia was no longer a sleeping giant; it was wide awake and moving forward. During the Portch administration, the Board of Regents and the people involved in creating and implementing the strategic plan shared a palpable pride in the University System of Georgia, what it was and what it could be.

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<sup>86</sup> Weber, interview.

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## APPENDIX

