

ADMINISTRATIVE MEMORANDUM

SUBJECT Long-Range Planning of The University
of North Carolina, 1982-1987

NUMBER 163

DATE 1/25/82

I. Purpose.

This memorandum provides instructions and guidelines for the next revision of the long-range plan of The University of North Carolina.

II. Previous Editions of the Long-Range Plan.

The long-range planning process, initiated by the President in January, 1974, culminated in the first edition of a long-range plan for The University in 1976. That first edition provided for an annual review and modification of the plan. There were annual revisions in 1977 and in 1978. The 1978 edition provided for biennial revision of the long-range plan. The current edition, adopted by the Board of Governors on February 13, 1981, called for the next revision to be completed during 1982-83 for the period 1982-1987.

III. Long-Range Planning, 1982-1987.

The next edition of the long-range plan will again cover five years, 1982-83 through 1986-87. The preparation of the planning document will again be a joint endeavor. Each institution, under the direction of the Chancellor, will develop and submit proposed amendments to its current five-year plan. The President's staff will be engaged also in University-wide planning, through various special studies and program reviews, and will engage in appropriate consultation with representatives of the Community College System, of the private colleges and universities, and of the State Department of Public Instruction. A comprehensive planning document will be prepared by this office for review and consideration by the Board of Governors, after a thorough review of institutional proposals and the completion of the necessary special studies.

A. Goals and Commitments Established in the Consent Decree.

The Consent Decree entered in the U.S. District Court for the Eastern District of North Carolina on July 17, 1981, is incorporated into Long-Range Planning, and the goals and commitments established in that Decree have been accorded first priority by the Board of Governors and will continue to have that first priority through the life of the Decree. All institutional plans should be consistent with this definition of priorities.

B. Special planning studies and activities already completed or in progress that will influence the long-range planning process include:

1. The review of Engineering education, now in progress.
2. The review and evaluation of programs in the academic discipline divisions of Public Affairs and Services, and Industrial Arts, Vocational and Technical Education, and Engineering Technology, nearing completion.
3. The report on Nursing Education, adopted by the Board of Governors in February, 1981, as a special segment of the current long-range plan, and the Report on Nursing Programs: North Carolina Agricultural and Technical State University, North Carolina Central University, and Winston-Salem State University, adopted in October, 1981.
4. Follow-up survey of the graduates in the class of 1979.
5. The report on the review of Research and Public Service programs, including revised procedures for planning and conducting extension/public service activities.
6. The reports on Teacher Education Program Reviews.
7. Follow-up activities from the review of programs in Home Economics, completed in January, 1980.
8. Review of major issues in research to include concern about the adequacy of scientific equipment.

C. Institutional proposals for amendments to the long-range plan should be developed under the direction of the Chancellor and with appropriate faculty consultation. Institutional planning should involve an examination of the current and prospective situations of the institution, and should be informed more broadly by previous editions of Long-Range Planning and by the special studies noted above that have been completed.

1. In light of the foregoing review, a specification of changes proposed in the present plan should be made over the next five years, including any:

a. Proposed changes in institutional mission, subject to the provisions cited below, including (1) requests for authorization to plan new degree programs in one or more discipline divisions in which the institution is not now authorized to offer degrees; (2) requests for authorization to plan master's degree programs by an institution currently offering no program beyond the baccalaureate level; and (3) requests to establish any major new institute or center for public service or research activities. However, no request for change in institutional mission to include initiation of doctoral-level degree offerings should be submitted.

b. Recommendations for the discontinuation of any authorized degree programs or program tracks. In developing the draft planning outline, each institution should review the need for the continuation of currently authorized programs, assessing quality, demand, costs, productivity, and other pertinent factors. Recommendations for discontinuing programs should include a schedule for the proposed discontinuation.

c. Requests for authorization to plan new degree programs, except that requests should not be submitted (1) for new programs at the doctoral level (subject to paragraph 1a above) unless there is clear demonstration of exceptional and compelling evidence of need; (2) for any new first professional degree program; (3) for any new degree programs in the discipline division of engineering unless by an institution currently authorized to offer engineering degrees; or (4) for any new degree program in nursing.

All requests for authorization to plan new degree programs must be submitted in the format found in Appendix A of the revised Academic Program Development Procedures, dated July 1981. (A copy of the form is attached.)

It is essential that any requests for authorization to plan new programs clearly specify institutional priorities among such requests, and indicate explicitly whether the proposed new programs, if established, are to be financed by (1) anticipated enrollment increases, (2) internal reallocation of resources, (3) new program support allocations in the institution's change budget, or (4) some combination of the foregoing.

Institutions should defer any new planning requests, beyond those approved in Long-Range Planning, 1980-85, until the submission of materials in response to this memorandum in December, 1982.

d. Status reports on all new degree programs currently authorized to be planned. The form for such reports is attached.

e. Requests for the establishment of new colleges or professional schools, or other proposals for major reorganization of the administrative structure of the institution.

f. An updated chart of the current administrative and academic organization of the institution. A copy of the organizational chart as found in the current long-range plan is attached for checking and correction. An up-to-date table of organization for the institution should be submitted. More detailed instructions on submission of the current table of organization will be provided later.

g. Such other pertinent matters as the institution may wish to incorporate into its proposed planning documents.

2. Institutional proposals should be in this office by December 1, 1982. Six (6) copies are requested for review. Each copy should be checked to ensure completeness. Type the name of the institution at the top of each page so that it may be identified easily. It is suggested that binders, such as loose-leaf notebooks, be used for easy insertion or removal of pages.

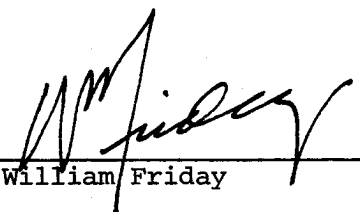
This office will then review and evaluate the proposed plans. Consultations will be held with the Chancellors or designated institutional representatives to clarify proposals or to fill gaps in information. It is anticipated that the results of the review will be shared with the Chancellors within three months of the original submission.

C. This office will prepare the projections of student enrollment for the next five years for each of the constituent institutions. Each Chancellor will be consulted during the preparation of the enrollment projections for his institution.

D. Program planning and development will also be addressed by the President and the Board of Governors. A particular institution or group of institutions may be called upon by the Board to participate in a special planning activity in an area in which the Board believes an important problem or need may exist but which is not appropriately or effectively addressed in institutional planning proposals.

E. Steps necessary to insure appropriate consultation and liaison with the Department of Community Colleges, the State Department of Public Instruction, and with representatives of the private institutions will be initiated to obtain information on their current activities and programs and their plans pertinent to The University's planning efforts.

F. On the basis of the above special studies, proposed institutional plans, and consultations, a draft plan for The University of North Carolina, 1982-1987, will be prepared for submission to the Committee on Educational Planning, Policies, and Programs of the Board of Governors by June 1, 1983. It is anticipated that the Committee will make its report and recommendations to the Board of Governors during the summer, and the Board will take such actions as it may deem necessary and appropriate to amend and adopt the long-range plan. The plan as approved by the Board of Governors will then be presented to the Governor, the Advisory Budget Commission, and the General Assembly in September, 1983.



William Friday

Attachments

- Attachment 1: Request for Discontinuation of Degree Program
or Program Track
- Attachment 2: Request for Authorization to Plan a New Degree
Program
- Attachment 3: Status of New Degree Program Previously Authorized
for Planning
- Attachment 4: Institutional Organization Chart from Long-Range
Planning, 1980-1985.

REQUEST FOR DISCONTINUATION OF DEGREE PROGRAM
OR PROGRAM TRACK

Institution: _____

HEGIS Code Number: _____

Title: _____

Level: _____

Reasons for request to discontinue:

Timetable for phasing out the program or program track:

Current enrollment in each level: Fr. _____ So. _____ Jr. _____ Sr. _____

Date of Request _____ Signature _____
Chancellor

REQUEST FOR AUTHORIZATION TO PLAN A NEW DEGREE PROGRAM

THE UNIVERSITY OF NORTH CAROLINA

INSTRUCTIONS: All requests for authorization to plan a new degree program must follow the format below. Add such additional information as you may desire. Review of the request cannot be completed until all information is submitted. Six (6) copies are required for review. Each request must be signed by the Chancellor.

Date: _____

Constituent Institution: _____

HEGIS Discipline Specialty Title: _____

HEGIS Discipline Specialty Number: _____ Level: B___ M___ I___ First Prof. ___ D___

Proposed date of establishment: month _____ year _____

1. Briefly describe the proposed new degree program for which planning authorization is now being sought. Include a statement of educational objectives, the relationship of the proposed new program to your institutional mission, the relationship of the proposed new program to other existing programs at your institution, and special features or conditions that make your institution a desirable, unique, or appropriate place to initiate such a new degree program.

2. List all other public and private institutions of higher education in North Carolina currently operating programs similar to the proposed new degree program for which planning authorization is now being sought.

3. Indicate the current and projected demand for graduates of the proposed new degree program for which planning authorization is now being sought. Provide documentation and sources of the data used to arrive at current and projected demand figures.

4. Describe the procedures which will be used to plan the proposed new degree program. Please identify the person responsible for planning, the planning schedule, and the expected date of submission of a program proposal if planning authorization is approved.

5. Describe the method of financing the proposed new program.

Chancellor: _____

STATUS OF NEW DEGREE PROGRAMS
PREVIOUSLY AUTHORIZED FOR PLANNING

Institution: _____

HEGIS Code Number: _____

Title: _____

Level: _____

Date Authorized for Planning: _____

Current Status of Planning:

Anticipated date for completion of planning: _____

Request planning authorization be reconfirmed
by Long-Range Planning, 1982-87: _____

Request planning authorization be withdrawn
by Long-Range Planning, 1982-87: _____

Date: _____

Signature: _____
Chancellor