January 20, 2021 at 1:00 p.m.
Via Videoconference and UNC-TV Live Stream
University of North Carolina System Office
Center for School Leadership Development, Room 128
Chapel Hill, North Carolina

AGENDA

A-1. Approval of the Minutes of October 21, 2020, and November 18, 2020.................Carolyn Coward

     Tyton Partners

A-3. Other Business ...........................................................................................................Andrew Kelly
     a. Update on Teacher Preparation Initiative
     b. Update on Student Mental Health Initiative

A-4. Adjourn
DRAFT MINUTES

October 21, 2020
University of North Carolina System Office
Via Videoconference and UNC-TV Live Stream

This meeting of the Committee on Strategic Initiatives was presided over by Chair Carolyn Coward. The following committee members, constituting a quorum, were also present in person or by phone: J. Alex Mitchell, W. Marty Kotis, III, Anna Spangler Nelson, and David Powers. The following committee members were absent: Michael Williford.

Chancellors participating were Chancellor Kelli Brown and Chancellor Brian Cole.

Staff members present included Dr. Andrew Kelly and others from the UNC System Office.

Other guests included Dr. Christie Cavanaugh from the University of North Carolina at Greensboro and Dr. Paola Pilnoieta from the University of North Carolina at Charlotte.

1. Call to Order and Approval of OPEN Session Minutes (Item A-1)

The chair called the meeting to order at 9:31 a.m. and called for a motion to approve the open session minutes of September 16, 2020.

MOTION: Resolved, that the Committee on Strategic Initiatives approve the open session minutes of September 16, 2020, as distributed.

Motion: W. Marty Kotis, III
Motion carried

<table>
<thead>
<tr>
<th>Roll Call Vote</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coward</td>
</tr>
<tr>
<td>Mitchell</td>
</tr>
<tr>
<td>Kotis</td>
</tr>
<tr>
<td>Nelson</td>
</tr>
<tr>
<td>Powers</td>
</tr>
<tr>
<td>Williford</td>
</tr>
</tbody>
</table>
2. **UNC System Literacy Framework Development Initiative Update (Item A-2)**

The committee was joined by two Literacy Fellows—Dr. Christie Cavanaugh, a clinical associate professor at UNC Greensboro; and Dr. Paola Pilonieta, an associate professor and director of the Reading Education Minor at UNC Charlotte. The Fellows described the progress of the common framework for literacy within the System to date. They provided the committee with examples of the detailed competencies and suggested instructional activities and assessments that will make up the framework. The committee then engaged in a discussion following the presentation.

3. **Transfer Student Success (Item A-3)**

The committee heard a presentation on transfer student enrollment and success. Dr. Andrew Kelly documented the significant increase in transfer student enrollments over the past decade. This increase can be attributed to the work of the Board and the Community College Board in revising the Comprehensive Articulation Agreement (CAA) in 2014. The committee discussed ways to maintain and improve transfer student success, including the proposed adoption of common course numbering.

There being no further business, the meeting adjourned at 10:52 a.m.

_________________________________
W. Marty Kotis, III, Secretary
This joint meeting of the Committee on Strategic Initiatives and the Committee on Educational Planning, Policies, and Programs was presided over by Chairs Carolyn Coward and Temple Sloan. The following committee members of the Committee on Strategic Initiatives, constituting a quorum, were also present in person or by phone: J. Alex Mitchell, W. Marty Kotis, III, Anna Spangler Nelson, David Powers, and Michael Williford.

Chancellors participating were Chancellor Kelli Brown and Chancellor Brian Cole.

Staff members present included Dr. Andrew Kelly and others from the UNC System Office.

The following committee members of the Committee on Educational Planning, Policies, and Programs, constituting a quorum, were also present in person or by phone: Anna Spangler Nelson, Steven B. Long, Jimmy D. Clark, Thomas C. Goolsby, and Isaiah Green.

1. Consideration of Revisions to UNC Policy Manual Section 400.1.5; Common Course Numbering (Item A-1)

The chair, Carolyn Coward, called the meeting to order at 10:56 a.m. The committees discussed the importance of implementing common course numbering. Drs. Andrew Kelly and Kimberly van Noort gave a presentation detailing the benefits of common course numbering and how students within the System, specifically transfer students, could see significant improvements in degree completion. The committees also heard from Chancellor Kelli Brown, Mr. Jim Coleman, and Dr. Kimberly Gold each reiterated the benefits of common course numbering while acknowledging the efforts needed to implement the change.

**MOTION:** Resolved, that the Committee on Strategic Initiatives consider the amendment to Section 400.1.5, establishment of a Common Course Numbering System.

**Motion:** Anna Nelson
**Motion carried**
Roll Call Vote Strategic Initiatives

<table>
<thead>
<tr>
<th>Name</th>
<th>Vote</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coward</td>
<td>Yes</td>
</tr>
<tr>
<td>Mitchell</td>
<td>Yes</td>
</tr>
<tr>
<td>Kotis</td>
<td>Yes</td>
</tr>
<tr>
<td>Nelson</td>
<td>Yes</td>
</tr>
<tr>
<td>Powers</td>
<td>Yes</td>
</tr>
<tr>
<td>Williford</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**MOTION:** Resolved, that the Committee on Educational Planning, Policies, and Programs consider the amendment to Policy 400.1.5, establishment of a Common Course Numbering System.

**Motion:** Anna Nelson
**Motion carried**

Roll Call Vote Educational Planning, Policies, and Programs

<table>
<thead>
<tr>
<th>Name</th>
<th>Vote</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sloan</td>
<td>Yes</td>
</tr>
<tr>
<td>Nelson</td>
<td>Yes</td>
</tr>
<tr>
<td>Long</td>
<td>Yes</td>
</tr>
<tr>
<td>Goolsby</td>
<td>Yes</td>
</tr>
<tr>
<td>Clark</td>
<td>Yes</td>
</tr>
</tbody>
</table>

There being no further business, the meeting adjourned at 11:30 a.m.

___________________________________
W. Marty Kotis, III, Secretary
AGENDA ITEM

A-2. Looking Ahead: Higher Education Innovation ............................................................ Gates Bryant
                     Tyton Partners

Situation: The committee will hear a presentation from Gates Bryant, partner at Tyton Partners, on the trends in innovation that will shape higher education in the decade to come.

Background: The COVID-19 pandemic has exacerbated trends already affecting colleges and universities, the students they serve, and the market in which they operate. Changing demographics, new demands in the labor market, rising costs for students and families, and advances in technology have challenged traditional higher education. However, these challenges also create opportunities for entrepreneurial and innovative colleges and universities. Universities have responded to these developments in a variety of ways, including the development of online degree programs, more flexible academic calendars, and new credentials that provide training in high-demand skills. Thus, the UNC System is facing some important questions. How will these trends and subsequent changes to the higher education market affect the UNC System and its constituent institutions? What are the most promising strategies and policies that can equip the UNC System to thrive in the decades to come?

Assessment: In this session, the committee will hear a presentation on the top trends that will shape higher education — and the UNC System in particular — in the decade to come. The presentation will explore how universities are responding to these trends, which ideas and strategies are the most promising, and how university systems should think about their role in supporting innovation. The presentation will conclude with a discussion about the strategies, policies, and initiatives that the UNC Board of Governors should consider given the System’s assets and comparative advantages.

Action: This item is for discussion only.
**Gates Bryant**

Gates Bryant joined Tyton Partners as a partner in 2011 in the strategy consulting practice. Gates is an experienced general manager and strategy consultant with a successful track record for bridging the gap between innovative strategy and practical execution. Bryant has been the lead partner on several strategy engagements in higher education with institutions, companies, and foundations. He has lead several important innovation initiatives in higher education in digital learning and student success, namely the Courseware in Context Framework (www.coursewareincontext.org) and Driving toward a Degree (www.drivetodegree.org). In addition to advising institutions and companies in education, he is a frequent author and speaker on topics involving strategy, teaching and learning innovation, and student success in higher education.

Prior to joining Tyton Partners, Bryant was an executive with Houghton Mifflin Harcourt, working in strategy, product management, and finance during a period of dramatic change in the educational publishing and technology industry. Bryant also spent seven years as a strategy consultant with the Parthenon Group. He advised clients on issues of revenue growth, profit improvement, and opportunities for mergers and acquisitions in the information, education, publishing, and technology industries. Bryant began his career as an investment consultant with Cambridge Associates where he evaluated global private equity and venture capital funds on behalf of foundations, endowments and other institutions.

From 2010 to 2014, Gates served on the start-up team of Edify, a US-based nonprofit that provides microloans, curriculum, and training to Christian schools in Africa and Latin America. Bryant holds a BA in Government from Dartmouth College and an MBA from the Tuck School at Dartmouth.
The State of Innovation in Higher Education
<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evolved Advisory</td>
<td>An evolved advisory platform serving clients across the global education, media and information markets</td>
</tr>
<tr>
<td>Investment Banking</td>
<td>Investment banking services built on a foundation of strategy development and operating experience</td>
</tr>
<tr>
<td>Strategy Consulting</td>
<td>Strategy consulting built on a foundation of transactional experience and data-based market insight</td>
</tr>
<tr>
<td>Unique Insights</td>
<td>A dynamic firm delivering insights, connectivity, and outcomes to a diverse range of companies, institutions, organizations, and investors</td>
</tr>
</tbody>
</table>
Tenured team, deep domain expertise and comprehensive capabilities

- Senior leadership team members have on average 20+ years experience in the education sector as bankers, advisors, operating executives and academic leaders

- 55+ professionals across the firm have completed 80+ strategy engagements and transactions since 2018 in higher education including institutions of all types and sizes, foundations, investors and companies

- For 10+ years, we have advised institutions of all types and sizes in both our investment banking and strategy consulting practices

Advisory services purpose-built for the current environment and sensitive to institutional mission

- Launched in 2020, the Center is an initiative of the entire firm to bring our combined expertise to the unique needs of non-profit higher education institutions

- Current market conditions create challenges and opportunities for institutions of all types, executing well requires unique insight in to shifting learner preferences and demographics, declining historic funding streams and an evolving policy environment

- Via the Center, Tyton provides the external perspective that catalyzes leadership teams to make transformative decisions with lasting impact

- Advisory services fall in three broad categories
  - Transformative partnerships
  - Revenue growth and diversification
  - Creative capital access
A sober assessment of innovation in higher education today…

Rapidly Changing Environment

Teaching & Learning

Credentialing

Business Models
AGENDA

- Evolving student profile
- Teaching and learning innovation
- Credential innovation
- Business model innovation
The undergraduate population is diverse racially, economically, generationally and likely to be balancing working and studying

New strategies and tools are necessary to keep up with changing population and needs for teaching and support

Sources: IPEDS, Tyton Partners analysis
During Fall 2020, higher education enrollment declined 2.5% across all institutions and degree types; deeper analysis surfaces key variations in the decline.

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Enrollment Decline %</th>
<th>Observations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution type</td>
<td>Public 4-year: 0.2%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Private 4-year: 1%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Public 2-year: (10.1)%</td>
<td>• Public 2-year institutions faced the greatest declines this fall, shrinking from 5.4M students in fall 2019 to 4.8M in fall 2020&lt;br&gt;• Overall, 4-year institution enrollment held steady at ~12.6M students</td>
</tr>
<tr>
<td>Degree type</td>
<td>Associates: (8.4)%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Bachelor’s: (0.9)%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Graduate: 3.6%</td>
<td>• Associate’s degrees – which 2-year institutions specialize in – took the biggest enrollment hit&lt;br&gt;• There is significant overlap between family income and institution type (~50% of students from families with &lt;$50k/year attend 2-year institutions) and students likely delayed school in favor of jobs</td>
</tr>
<tr>
<td>First-time students</td>
<td>Public 4-year: (8.1)%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Private 4-year: (8.8)%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Public 2-year: (21)%</td>
<td>• For students entering college for the first time, enrollment dropped significantly&lt;br&gt;• Public 2-year institutions faced significant declines, matriculating only 80% of the 2019 fall enrollment volume</td>
</tr>
<tr>
<td>Age</td>
<td>18-24: (3.7)%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>25+: (1.0)% overall, 2.5% at 4-year institutions</td>
<td>• Enrollment from traditional age students dropped more than from those who are 25+&lt;br&gt;• Students aged 25+ increased enrollment in 4-year institutions (masked by the decline in enrollment at 2-year institutions) is akin to what might occur during a countercyclical increase</td>
</tr>
<tr>
<td>Status</td>
<td>Full-time: (2.2%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Part time: (3.1)%</td>
<td>• Status did not play a dominant role in whether a student would enroll in college this year</td>
</tr>
</tbody>
</table>

Sources: National Student Clearinghouse, The CollegeBoard, Tyton Partners analysis
Nationwide an increasing number of students have either dropped, failed, or withdrawn from introductory courses this fall, particularly at 2-year institutions.

**% of faculty reporting a change in student drop rate**

- **2-year institution**
  - Decreased: 10%
  - Stayed about the same: 51%
  - Increased: 39%

- **4-year institution**
  - Decreased: 11%
  - Stayed about the same: 64%
  - Increased: 24%

**% of faculty reporting a change in anticipated fail rate**

- **2-year institution**
  - Decreased: 11%
  - Stayed about the same: 51%
  - Increased: 38%

- **4-year institution**
  - Decreased: 15%
  - Stayed about the same: 56%
  - Increased: 29%

Note: "Based on faculty assessment for their highest-enrollment course; survey questions: "Compared to when you have taught this high-enrollment course in the past, how did the percentage of students who dropped or withdrew the class change this fall term?"; "Compared to when you have taught this high-enrollment course in the past, how do you anticipate the percentage of students who will fail the class to change this fall term?"

Sources: Faculty Sentiment Fall 2020, Tyton Partners analysis
The pandemic year highlights the need for personalized, flexible, and affordable alternatives to the traditional four-year postsecondary experience.

Top student challenges perceived by faculty, Fall 2020

1. Managing and preserving mental health and wellness
2. Fitting the course in with home/family responsibilities
3. Ensuring reliable internet access
4. Fitting the course in with their work schedule

Sources: Faculty Sentiment Fall 2020, Tyton Partners analysis
A G E N D A

Evolving student profile

Teaching and learning innovation

Credential innovation

Business model innovation
Before the pandemic, changing student profile was forcing a shift in higher education models, with many opting for online or blended models.

<table>
<thead>
<tr>
<th>Enrollment growth* by type of institution and delivery method (2014-2018)</th>
<th>2-year</th>
<th>4-year public</th>
<th>4-year private</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exclusively Online</td>
<td>6%</td>
<td>7%</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Total enrollment (2018)</td>
<td>0.8M</td>
<td>1.0M</td>
<td>1.4M</td>
<td>3.3M</td>
</tr>
<tr>
<td>Blended</td>
<td>2%</td>
<td>9%</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Total enrollment (2018)</td>
<td>1.2M</td>
<td>2.0M</td>
<td>0.5M</td>
<td>3.7M</td>
</tr>
<tr>
<td>On-Campus</td>
<td>-4%</td>
<td>-2%</td>
<td>-2%</td>
<td>-3%</td>
</tr>
<tr>
<td>Total enrollment (2018)</td>
<td>4.1M</td>
<td>5.9M</td>
<td>3.0M</td>
<td>13.1M</td>
</tr>
</tbody>
</table>

Note: *Enrollment is combined undergraduate and graduate levels
Sources: IPEDS, Tyton Partners analysis
The shift to remote learning left faculty with a more positive sentiment for online, including some who were critical coming into the experience.

**Shift in perception of online learning during COVID-19, Spring 2020**

- Grew more favorable towards online learning (45%)
- Perception of online learning did not change (38%)
- Grew less favorable towards online learning (17%)

*Survey questions: “How has your perception about online learning shifted since the start of COVID-19? N = 4,791
Sources: Faculty Sentiment Spring 2020, Tyton Partners analysis*
Introductory faculty report that their institutions have made progress toward an ideal digital learning environment; faculty at 2-year grade their more institutions positively.

“My institution is achieving an ideal digital learning environment”

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before COVID-19</td>
<td>32%</td>
<td>32%</td>
<td>36%</td>
</tr>
<tr>
<td>During remote teaching (May 2020)</td>
<td>35%</td>
<td>35%</td>
<td>30%</td>
</tr>
<tr>
<td>In preparation for fall term (August 2020)</td>
<td>53%</td>
<td>26%</td>
<td>20%</td>
</tr>
<tr>
<td>Fall term (November 2020)</td>
<td>50%</td>
<td>30%</td>
<td>20%</td>
</tr>
<tr>
<td>2-year institution (November 2020)</td>
<td>56%</td>
<td>30%</td>
<td>14%</td>
</tr>
<tr>
<td>4-year institution (November 2020)</td>
<td>46%</td>
<td>30%</td>
<td>24%</td>
</tr>
</tbody>
</table>

N: 732 729 763 794 298 496

Note: Before COVID-19 question: “Prior to the COVID-19 crisis, how would you characterize your agreement with the statement [my institution is achieving an ideal digital learning environment]?”

May survey question: “As you consider the coming Fall term, how would you characterize your agreement with the statement [my institution is achieving an ideal digital learning environment]?”; August and November survey question: “As of now, how would you characterize your agreement with the statement [my institution is achieving an ideal digital learning environment]?”

Sources: Faculty Sentiment Spring, Summer, and Fall 2020, Tyton Partners analysis
What will teaching and learning look like in the future?

Present

Flexibility

Nationwide scale

Terminal degree

Access

Future

Personalization 2.0

Local

Lifelong learning

Price point & credential diversity

Evidence

Source: Tyton Partners analysis
AGENDA

Evolving student profile
Teaching and learning innovation
Credential innovation
Business model innovation
Certificates as an alternative pathway to employment are the largest portion of the postsecondary education landscape.

“The coronavirus will also accelerate growth of nontraditional programs such as undergraduate nondegree/certificate programs, where career-advancement courses can be completed discretely and bundled into a degree.” – Inside HigherEd

Five key characteristics distinguish alternative from traditional postsecondary pathways; these characteristics are relative, not absolute.

<table>
<thead>
<tr>
<th>Traditional</th>
<th>Alternative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge</td>
<td>Skills</td>
</tr>
<tr>
<td>What we know and understand</td>
<td>How we use what we know and understand</td>
</tr>
<tr>
<td>Institution</td>
<td>Credential</td>
</tr>
<tr>
<td>Quality is associated with institution</td>
<td>Quality is associated with credential</td>
</tr>
<tr>
<td>Complete</td>
<td>Modular</td>
</tr>
<tr>
<td>Associate’s, bachelor’s, master’s and doctoral degrees</td>
<td>Degrees partitioned into courses, certificates, and badges</td>
</tr>
<tr>
<td>High</td>
<td>Low</td>
</tr>
<tr>
<td>More expensive</td>
<td>More economical</td>
</tr>
<tr>
<td>Long</td>
<td>Short</td>
</tr>
<tr>
<td>Typically two to four years</td>
<td>Typically one hour to one year</td>
</tr>
</tbody>
</table>

Source: Tyton Partners analysis
Demand for alternative credentials amongst learners was growing prior to COVID-19, but has been further accelerated as a result of the pandemic.

**Growth in Top Four MOOCs (2017-19)**

Number of registered learners

- Coursera: 2017 (25M), 2018 (50M), 2019 (75M)
- edX: 2017 (25M), 2018 (50M), 2019 (75M)
- Udacity: 2017 (25M), 2018 (50M), 2019 (75M)
- FutureLearn: 2017 (25M), 2018 (50M), 2019 (75M)

**Growth in Coding Bootcamps (2015-19)**

Number of full-time bootcamp graduates

- 2015 (0), 2017 (15,000), 2019 (25,000)

Source: *Class Central, **Course Report
Amidst COVID-19, adult learners see alternative credentials as a desirable option relative to degrees

**Adult Learner Intention to Enroll in Education or Training Programs (July 2020)**

- **Within 1 Month**: 10%
- **Within 3 Months**: 20%
- **Within 6 Months**: 30%
- **Within 1 Year**: 40%
- **Within 2 Years**: 50%
- **Within 5 Years**: 60%

25% of adults indicated that they will enroll in some form of ed. or training program within the next six months.

**Adult Learner Goals for Enrollment (July 2020)**

- **Graduate degree**: 10%
- **Associate degree**: 15%
- **Bachelor's degree**: 20%
- **One or more courses for personal interest**: 40%
- **One or more courses to get some skills I need for work**: 35%
- **Certificate, certification, or license**: 30%

Nearly 2/3 of adults planning to enroll within six months wish to do so to obtain an alternative credential of some sort.

*Source: Strada Center for Consumer Insights*
Issuers of alternative credentials separate into four distinct segments; self-directed short course segment aligns with greatest potential market entry opportunity.

Sources: Company websites, Tyton Partners analysis
A G E N D A

Evolving student profile
Teaching and learning innovation
Credential innovation

Business model innovation
Changing the business model requires methodical assessment across the System

Business Model Transformation Drivers

1. Who We Serve
   • What types of students (i.e., demographics) does UNC serve today?
   • How does this compare to state demographics?

2. Brand & Reach
   • How does brand positioning differ by institution?
   • What is the geographic reach of individual institutions and the system as a whole?

3. How We Serve
   • Which program areas are offered online?
   • Is there overlap in program offerings across the system?
   • Do institutions compete for students online?

4. Infrastructure
   • How are individual institutions organizing the development, marketing, and delivery of online learning today?

5. Culture & Attitudes
   • What attitudes prevail about digital learning across the system?

6. Policy & Incentives
   • Are there existing financial incentives or disincentives that promote/prevent online learning behavior and growth?
Among leading online institutions, the business model innovators outperformed on growth during the last recession.

### Relative Enrollment Growth of Selected Primarily Online Institutions

<table>
<thead>
<tr>
<th>Select Institutions***</th>
<th>CAGR 2008-2012</th>
<th>~13%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Institutions</td>
<td>CAGR 2013-2018***</td>
<td>~6%</td>
</tr>
</tbody>
</table>

Note: *Growth multiples are derived using 2008-2009 academic year enrollment numbers as base. **Primarily online institutions were defined as having greater than 70% of their total enrollments being exclusively online. ***Select institutions include: SNHU, WGU, GCU, Liberty, UMUC, APU, Walden and Capella.

Sources: IPEDS, Tyton Partners analysis
Both blended and exclusively online have been critical for these institutions & systems

Undergrad Degree / Certificate-Seeking Enrollment Growth, 2012-2018

A national exclusively online program strategy can be accomplished via build or partner
Blended is critical for serving regional students
Growth via acquisition is an increasingly common path

Notes: *University of Arizona’s 2018 enrollment includes additional undergraduate enrollees gained through acquisition of Ashford University. Ashford University’s total enrollment is 35K students; **UMass’ 2018 enrollment includes additional undergraduate enrollees gained through acquisition of Brandman University. Brandman’s total enrollment is 9K students.
Sources: IPEDS 2012-2018, Tyton Partners analysis
Respondents in central online unit-led models report better outcomes across key areas

% of institutional leaders who agree with the following statements related to digital learning at their institution. My organization….

N = 46

<table>
<thead>
<tr>
<th>Statement</th>
<th>Central Online Unit-led</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is achieving an ideal digital learning environment</td>
<td>71%</td>
<td>65%</td>
</tr>
<tr>
<td>Encourages interdepartmental Collaboration</td>
<td>74%</td>
<td>63%</td>
</tr>
<tr>
<td>Sufficiently funds and Resources DL</td>
<td>63%</td>
<td>52%</td>
</tr>
<tr>
<td>Uses DL to improve the consistency of student experience</td>
<td>83%</td>
<td>78%</td>
</tr>
<tr>
<td>Uses DL to reduce time to degree</td>
<td>76%</td>
<td>76%</td>
</tr>
<tr>
<td>Uses a revenue allocation Methodology that supports scale</td>
<td>45%</td>
<td>38%</td>
</tr>
</tbody>
</table>
A strategy & innovation agenda for the UNC System

Teaching & Learning

- Personalization 2.0: course progressions and learning at a pace that works for the new majority student, relentless pursuit of student-centered remediation to close equity gaps
- Hyper-local: pathways that are aligned to local/regional labor and economic development needs
- Lifelong learning: streamline on and off ramps to academic programs, facilitate career and life transitions

Credentialing

- Use your brand to build signal strength of credentials offered
- Target healthcare and find new ways to meet labor shortage in heavily regulated clinical professions
- Equip institutions to add-on credentials to existing degree programs

Business Model

- Find new ways to capitalize on your scale as a system, implement a System shared services strategy
- Create flexibility in pricing, recognizing that your competition is coming from out of state
- Explore new funding sources and payors for the higher education enterprise
AGENDA ITEM

A-3a. Update on Teacher Preparation Initiative.................................................... Andrew Kelly and Laura Bilbro-Berry

Situation: Board of Governors’ Resolution on Teacher Preparation (April 17, 2020) calls on the UNC System Office to do three things. First, to facilitate the creation of System-wide teacher preparation goals and associated metrics that reflect the work of the Educator Preparation Advisory Group and relevant state and system policies. Second, to develop, in collaboration with educator preparation and literacy experts, a common framework for literacy instruction in teacher preparation that will be adopted by UNC System educator preparation programs (EPPs). And third, to identify or create a professional development model for in-service teachers and faculty that is aligned with the literacy framework to be piloted beginning summer 2021.

Background: Over the course of 2018 and 2019, the UNC System’s Educator Preparation Advisory Group, a cross-sector group of experts in teacher preparation and educational leadership from across North Carolina, recommended four goals to advance improvements within UNC educator preparation programs. Those goals included ensuring that EPPs are recruiting strong and diverse teaching candidates; that those candidates have an opportunity to learn their craft within high-quality clinical experiences; that teaching candidates are prepared to be effective teachers on day one; and that teaching candidates take rigorous coursework in the science of reading.

In parallel, under S.B. 599 and H.B. 107, the General Assembly has enacted a new state accountability system for EPPs that will measure program performance. State statute (G.S. 115C-269.20) also requires teacher preparation programs to provide training to elementary and special education general curriculum teachers that includes instruction in reading as a process involving oral language, phonological and phonemic awareness, phonics, fluency, vocabulary, and comprehension.

Assessment: To set concrete, measurable goals for educator preparation, the System Office has partnered with the Education Policy Initiative at Carolina (EPIC) at UNC-Chapel Hill to identify goals, metrics, and targets in the four areas identified by the Educator Preparation Advisory Group and aligned with state statute and policy, beginning with the goal focused on reading instruction. The presentation will provide a progress report on these activities.

Action: This item is for information only.
UNC System Educator Preparation Advisory Group (EPAG) has identified goals to ensure that teaching candidates are prepared, through rigorous coursework and clinical experiences, to be as effective as possible on day one. In alignment with G.S. 115C-269.20, the advisory group seeks to ensure elementary and special education general curriculum candidates are provided training in evidence-based reading practices to positively impact early literacy within North Carolina’s public schools.

Based in part on the work of the EPAG, the Board of Governors’ Resolution on Teacher Preparation was adopted in April 2020 and calls on the UNC System Office to “adopt System-wide teacher preparation goals and associated metrics that reflect the work of the Educator Preparation Advisory Group and state accountability metrics in SB 599 and HB 107.”

This fall, in response to the resolution, the UNC System Office partnered with the Education Policy Initiative at Carolina (EPIC) to develop these system-wide goals, metrics, and targets for teacher preparation, as well as determine a data collection plan for those metrics. Based on the work of the Advisory Group, the Board of Governors’ resolution, and state statutes and policies, the project team has identified draft goals and associated metrics, including:

- **Early Literacy**: Ensure that teaching candidates attain essential pedagogical content knowledge and accomplish mastery of evidence-based reading practices for all students, including those from diverse gender, racial, ethnic, economic, geographic, and linguistic backgrounds.
  - Foundations of reading licensure exam: first passage rates and scores (disaggregated by individual sub-scales of competencies and by route and licensure group);
  - EVAAS estimates: estimates for graduates in their first three years of teaching with percentage of UNC EPP completers that meet or exceed growth in reading (disaggregated by route and licensure group).

- **Recruitment**: Recruit, select, and support a highly-qualified pool of teacher candidates and beginning teachers that reflects the demographics of the public school student population.
  - Number of candidates who applied, were admitted, and completed;
  - Academic profile of program entrants.

- **Clinical Practice**: Structure candidates’ coursework and clinical opportunities to enable them to see key practices and routines modeled, followed by rehearsal and practice with feedback in a variety of classroom settings.
  - Number and percentage of teacher candidates who student teach in a high-quality learning environment (i.e. field placement school EXCEEDS expected growth);
  - Number and percentage of teacher candidates who student teach with a highly-effective cooperating teacher (i.e. highly-rated on NCEES teacher evaluation instrument; high value-added on EVAAS).

- **Ready on Day One**: Contribute to the state’s critical teacher workforce needs by preparing high quality teachers to successfully serve students from diverse gender, racial, ethnic, economic, geographic, and linguistic backgrounds, with a particular emphasis on hard-to-staff subject areas and high-need schools.
  - edTPA pass rates and the average value above or below the cut score disaggregated by route and licensure group;
  - Licensure exam (e.g. Praxis II, Pearson) First-time scores and overall pass rates/scores disaggregated by route and licensure group.
To advance the establishment of goals to be adopted by individual educator preparation programs around the four comprehensive EPAG goals for teacher preparation, a series of milestones have been established:

<table>
<thead>
<tr>
<th>Timeline</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2020</td>
<td>Suggested metrics from EPAG distilled into key data points for each area with an examination of data currently required by NCDPI and the legislated EPP Accountability Model. Initial data collection plans developed and a timeline of deliverables created.</td>
</tr>
<tr>
<td>January 2021</td>
<td>Associated metrics for the “early literacy” goal finalized; baseline data to be collected, disaggregated and analyzed. Draft list of metrics associated with four System-wide goals to be shared at the January EPAG meeting to collect additional feedback; metrics and data collection plans may be revised based on feedback.</td>
</tr>
<tr>
<td>February 1, 2021</td>
<td>Baseline data on “early literacy” metrics will be provided by EPIC.; EPP-level data will be shared with programs as part of the implementation of the UNC System Literacy Framework. Technical assistance will be provided to campuses as they work on their implementation plans which will be submitted to the System Office in May.</td>
</tr>
<tr>
<td>February 2021</td>
<td>Finalize and analyze baseline metrics for “clinical practice” goal.</td>
</tr>
<tr>
<td>March 1, 2021</td>
<td>“Clinical practice” data provided by EPIC to UNC System Office; information shared with the EPAG.</td>
</tr>
<tr>
<td>March &amp; April 2021</td>
<td>Associated metrics for “recruitment” and “ready on day one” goals finalized; data collected, disaggregated, and analyzed. Initial findings from data collection of all goals will be shared at the April EPAG meeting. EPIC, in collaboration with the UNC System Office, will draft EPP-level goals and provide technical assistance to individual campuses to refine these EPP-level goals.</td>
</tr>
<tr>
<td>June 2021</td>
<td>System-level goals for the four focus areas will be presented to the Board of Governors for adoption.</td>
</tr>
</tbody>
</table>

Additional metrics for each of the four comprehensive goals may be collected, disaggregated, and analyzed.
AGENDA ITEM

A-3b. Update on Student Mental Health Initiative

.................................................................Andrew Kelly

Situation: Board of Governors’ Resolution on Student Mental Health (September 17, 2020) called on the President and his staff to examine a series of questions related to student mental health, including: the appropriate level of student mental health service provision the UNC System should strive for and how to measure progress towards that level; whether existing funding sources are sufficient to meet that standard across the System, and if there are alternative revenue models should the UNC System consider; and what best practices and innovations the UNC System and its constituent institutions should consider to improve the delivery of student mental health services. The Resolution calls for a final report of findings and recommendations to be presented to the Strategic Initiatives committee and the Board of Governors in March 2021.

Background: Having heard several presentations on student mental health over the last year, the Committee on Strategic Initiatives formally recognized that student mental health affects academic performance, retention, graduation, and quality of student life on campus; that national studies indicate that demand for mental health services on college campuses has increased over the past decade; and that the increase in demand for services has strained student health budgets and the capacity of student health centers to respond — a trend that is likely exacerbated by the pandemic. Because responding to these trends will require creative thinking about how mental health services and programming are financed, structured, and delivered, the Student Mental Health Initiative was developed in response to the Board of Governors resolution on student mental health. The Initiative is in the process of collecting and analyzing data, reviewing the literature and promising practices from the field, and developing actionable recommendations to the Board of Governors through the Committee on Strategic Initiatives.

Assessment: The update will provide a progress report on these activities.

Action: This item is for information only.
UNC System Student Mental Health Initiative Update

January 2021

Background:

Over the course of 2019 and 2020, the Board of Governors Committee on Strategic Initiatives hosted a series of discussions of student mental health and the implications for academic performance, retention and graduation, and the quality of student life on campus. Those discussions highlighted increases in the incidence of student mental health conditions among college-age students and in demand for student health services. These trends have strained student health budgets and the capacity of counseling and psychological centers to respond. In response, in September 2020 the Board of Governors passed a resolution that tasked the President, in consultation with experts from across the UNC System, to examine the following questions and make recommendations to the Board of Governors:

- What is the appropriate level of mental health service that UNC System institutions should strive to provide, and how should the System measure whether that level of service delivery has been achieved?
- Are existing funding sources sufficient to meet that standard across the System? What alternative revenue models should the UNC System consider?
- What best practices and innovations should the UNC System and its constituent institutions consider to improve the delivery of student mental health services?

Progress to Date:

To analyze these questions and develop recommendations to the board, the System Office has convened three workgroups made up of experts from across the System. Each group is chaired by a senior leader in the area of focus. The workgroups are as follows:

Workgroup #1: Measurement & Outcomes

- Monica Osburn, Executive Director of Counseling Center and Prevention Services, NC State (chair)
- Paula Keeton, Director, CAPS, UNCC
- Dionne Hall, Director of the Counseling and Personal Development Center, FSU
- Ronette Gerber, Director, Title IX and Clery Compliance Officer, UNCP
- Betsy Lanzen, Associate General Counsel, NC State
- Dr. Melinda Anderson, Interim Associate Vice Chancellor of Academic Affairs, ECSU
- Dr. Terry Lynch, Vice Chancellor for Students Affairs, NCSSM

Workgroup #2: Finance, Funding & Revenue Model

- Elizabeth (Beth) A. Hardin, Vice Chancellor for Business Affairs at UNC Charlotte (chair)
- Paul Forte, Vice Chancellor for Business Affairs at App State
- Virginia Teachey, Vice Chancellor for Finance & Administration, UNCP
- Michael Smith, Vice Chancellor for Finance and Administration, UNCSA
- Dr. Lee Brown, Interim Provost and Vice Chancellor for Academic Affairs at FSU
- Nikkia Sheppard Lynch, Business Officer, Academic Finance Office, UNC Chapel Hill
Workgroup #3: Best Practices & Innovations

- Dr. Vivian Barnette, Executive Director of Counseling Services, NCAT (chair)
- Dr. Valerie Kisler-van Reede, Director of Counseling Services, ECU
- Dr. Mark Perez-Lopez, Director of Counseling Center, UNCW
- Dr. Christopher J. Hogan, Director and Chief Psychologist, App State
- Dr. Brett Carter, Dean of Students, UNCG
- Kelly White, Deputy Chief of Police and Public Safety, WSSU

Each of the groups will have had a kickoff meeting by the end of this month, and will continue to meet weekly through March. They have identified data needed from across the System, as well as from external entities, and are in the process of collecting those data to inform their work. They are also identifying additional individuals both within and outside of the System to consult in formulating their recommendations.

The final report of findings and recommendations shall be presented to the committee and the Board of Governors at the April 2021 regular meeting.