

THE UNIVERSITY OF NORTH CAROLINA

OFFICE OF THE PRESIDENT

ADMINISTRATIVE MEMORANDUM

SUBJECT Long-Range Planning of The University of
North Carolina, 1975-1980

NUMBER 33

DATE April 22, 1974

TO ALL CHANCELLORS:

I. The Purposes of Long-Range Planning

1. To comply with the State law, which directs that

The Board of Governors shall plan and develop a coordinated system of higher education in North Carolina. . . . The Board, in consultation with representatives of the State Board of Education and of the private colleges and universities, shall prepare and from time to time revise a long-range plan for a coordinated system of higher education, supplying copies thereof to the Governor, the members of the General Assembly, the Advisory Budget Commission and the institutions. G.S. 116-11(1)

2. To provide an occasion for chancellors and their institutional staffs and the boards of trustees to think in an orderly and comprehensive way about the roles of their respective institutions within The University and how those institutions might best fulfill those roles between 1975 and 1980.

3. To provide an occasion for the Board of Governors of The University, with the aid of the General Administration staff:

- (a) To think in an orderly and comprehensive way about the higher educational needs of North Carolina and the most appropriate response of The University to them;
- (b) to appraise the strengths and weaknesses of the constituent institutions and The University as a whole; and

- (c) to plan the course of development of The University over the next five years.

4. To fulfill the expectations of the Board of Governors, the General Assembly (as reflected in a resolution adopted by the Appropriations Committees this spring), the constituent institutions, and the people of the State that The University will make the most effective, efficient, and economical use of the resources entrusted to it, and that it will eliminate and avoid unnecessary duplication of programs and activities by the constituent institutions.

5. To enable The University to respond to the special problems posed by the anticipated deceleration after a long period of growth in enrollments and associated growth in institutional resources. It is apparent that statewide, the numbers of prospective college students within the traditional age brackets is levelling off and will decline sharply after the early 1980's. It is probable also that the resources the State will have to invest in program growth in the institutions of higher education will be scarcer than in recent years, and the limited prospective growth or (in some cases) the decline in enrollments will reduce the inclination as well as the capacity of the General Assembly to provide funds for significant institutional expansion.

6. To provide a basis for judgment by the Board of Governors, in statewide terms, as to the needfulness of each new program or activity proposed in the future by a constituent institution.

7. To establish a continuous planning process within The University.

II. General Objectives of The University of North Carolina Plan for 1975-1980:

1. To declare the general goals of The University for 1975-1980 and the assumptions on which those goals are based.

2. To describe The University (its authority, governance, organization, financing, etc.) and its constituent institutions.

3. To describe the role and scope of each constituent institution as now defined and as they may change in content or emphasis by 1980, thus setting a general framework within which its current programs will be carried on and new ones may be developed up to 1980. The plan will

(a) Catalog the special goals of each institution, consistent with those of The University as a whole; and

(b) Catalog the authorized academic programs and activities of each constituent institution as of January 1, 1975.

4. To indicate which current programs and activities should be given priority emphasis for improvements and/or expansion, with estimates of costs in faculty, staff, equipment, facilities, and other resources.

5. To indicate which current programs and activities of the constituent institutions should be reduced in scope or eliminated between 1975 and 1980.

6. To determine the general nature of the new or increasing educational program and activity needs which The University should strive to meet between 1975 and 1980, the costs of such programs, and how these costs will be met.

7. To assess the long-term budgetary implications of objectives 4, 5, and 6 as they relate to the re-allocation of resources within institutions and the need for new resources.

8. To establish procedures for the annual review and extension of the plan, so that it will at all times cover at least four years.

III. The Long-Range Planning Process

1. The President initiated this process with the issuance of Administrative Memorandum No. 27 on January 29, 1974.

2. The General Administration staff will advise the chancellor and the chief academic officer on each campus of the general terms and objectives of the long-range planning process and will maintain close contact with those officers on the progress of the planning process and problems encountered in its course.

3. Each chancellor is expected to establish such organization and procedures at the institutional level as he deems best for developing his institution's part of the long-range plan.

4. Through memoranda and conferences, the General Administration staff will advise the chancellors and the chief academic officers of the institutions of what information is wanted from those institutions and will provide them with information that will be useful to them in their institutional planning.

5. The institutions will submit their five-year (1975-80) draft planning outlines to the General Administration, preferably by September 1, 1974, and no later than October 15, 1974, in order that the necessary review and action stages may be completed early in 1975.

6. The General Administration staff will undertake to obtain from the Community College System and the private institutions information on their current activities and programs and their plans pertinent to The University's planning efforts.

7. The draft planning outlines submitted by the 16 constituent institutions will be reviewed by the President's office. Periodic conferences will be held with representatives of the constituent institutions. Where necessary, consultants will be called in to advise on particular aspects of the long-range plan.

In addition to other considerations, commitments made to HEW in the desegregation plan will require that special attention be given to the possibility of racially significant program duplications among institutions,

and a study must be made of the qualitative deficiencies of the predominantly black institutions and what additional financial investment and other actions will be necessary to eliminate any deficiencies found.

8. The President and the Board of Governors may initiate program development planning with respect to particular problems and areas that they may identify. Such planning may, for example, take the form of the comprehensive, University-wide library improvement program submitted by the Board of Governors in its budget request for 1974-75; or the Board may call upon a particular institution or group of institutions to initiate a specific planning effort in an area which it believes important state needs are not being met adequately but which may not have been appropriate for inclusion in the individual institutions' draft planning outline. Apparent, significant unnecessary program duplications may be the subject of special studies on the initiative of the Board.

9. A draft plan for The University of North Carolina, 1975-80, will then be prepared on the basis of the draft planning outlines and any special studies undertaken on the initiative of the Board of Governors. This comprehensive document will be submitted to the Chancellors for their review and comment before its presentation to the Committee on Educational Planning, Policies, and Programs of the Board of Governors.

10. The comprehensive plan will be presented to the Committee on Educational Planning, Policies, and Programs of the Board of Governors about November 15, 1974. That Committee is expected to review the plan in detail.

11. The Committee on Educational Planning, Policies, and Programs will report to the Board of Governors its recommended comprehensive, long-range plan about January 1, 1975. The Board of Governors will review the plan and take appropriate actions.

12. The plan as approved by the Board of Governors will be presented to the Governor, the Advisory Budget Commission, and the General Assembly at the earliest practicable date in 1975.

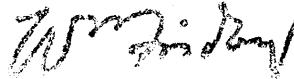
IV. The Draft Planning Outline

The information-gathering work of the last several months has provided the staff of the General Administration with much data that will constitute essential background for the preparation of the long-range plan. More such information will be sought from the institutions over the next few months as further needs appear.

The next and principal step on each campus will be for the chancellor to prepare a draft planning outline--a proposed five-year plan--for his institution. The following will indicate in general terms the scope and content of this draft planning outline. More detailed information about each section and major topic of this draft will be discussed further with institutional planning officers.

1. A description of the present "state of the institution."
 - a. Scope mission and functions as now defined.
 - b. Administrative organization and governance.
 - c. Present strengths, present deficiencies, and special opportunities.
2. Enrollment projections
 - a. Application and acceptance rates, 1969-70 through 1973-74.
 - b. Admissions policies.
 - c. Projected enrollments, by year, to 1979-80 (as related to 3, below).
3. Academic program planning
 - a. Improvements and expansion of existing programs.
 - b. Curtailment or elimination of programs.
 - c. Intended new programs.

4. Faculty and staffing plans.
5. Budget projections, as related to enrollments, program, and other planning.

A handwritten signature in dark ink, appearing to read "W. Friday", is written above a horizontal line.

William Friday