

ADMINISTRATIVE MEMORANDUM

SUBJECT Long-Range Planning of The University of
North Carolina, 1980-1985

NUMBER 133

DATE 1/22/80

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 gave particular attention to the missions and to the academic program plans of the sixteen constituent institutions and provided for an annual review and modification of the long-range plan. The 1977 edition of the plan contained revisions of the academic program plans and additional treatment of extension credit activities and public service programs. The current edition, adopted by the Board of Governors on December 8, 1978, again reviewed and revised those elements and added a descriptive chapter on student services. The 1978 edition provided for biennial revision of the long-range plan, with the next revision to be completed in 1980 for the period 1980-85.

III. Long-Range Planning, 1980-1985.

The 1980 edition of the long-range plan will again cover five years, 1980-81 through 1984-85. As on previous occasions, the preparation of the forthcoming planning document will be a joint endeavor. Each institution, under the direction of the Chancellor, will develop and submit a proposed institutional plan for the five-year period. The President's office 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 and of the private colleges and universities. A comprehensive planning document will be prepared by this office for review and consideration by the Board of Governors, after a thorough review of all proposed institutional plans and the completion of the necessary special studies.

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

1. The special study of academic program duplication at the baccalaureate and master's levels among six constituent institutions, completed in December, 1978.

2. The study of existing and prospective engineering programs at the baccalaureate and master's levels in the three constituent institutions that have schools of engineering, completed in December, 1978.

3. The comprehensive study of faculty workload, tenure, and related professional activities, completed in February, 1979.

4. A report with recommendations on the preparation of professional personnel to work with children with special needs, completed in March, 1979.

5. Follow-up activities from the reviews of programs in teacher education and of graduate programs in the health professions.

6. The planning activities of the Board of Governors with the State Board of Education on the Quality Assurance Program for Professional Personnel in the public schools, now in progress.

7. A continuing review of the charters and activities of research and public service centers and institutes and of policies and procedures for public service activities.

8. A review of the policies and procedures for extension instruction, now in progress.

9. A revision of the master plan for nursing education for the period 1980-1985, now in progress.

10. The review and evaluation of programs in the academic discipline divisions of Home Economics, Industrial Arts and Technical Education, and Public Affairs and Services, now in progress.

11. Follow-up surveys of the graduates in the classes of 1974 and 1979, now in progress.

12. Studies of the feasibility of establishing graduate centers in Winston-Salem and in Elizabeth City, now in progress.

Finally, the State Plan, Phase II, although not accepted by the Department of Health, Education, and Welfare, contains goals and objectives defined and established by the Board of Governors that will be reflected appropriately in Long-Range Planning, 1980-1985.

B. Proposed institutional five-year plans for 1980-85 should be developed under the direction of the Chancellor and with appropriate faculty consultation. Institutional planning should be informed by 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. Institutional plans should contain the following elements:

1. A description of the current status of the institution to include:

a. A statement of the mission and functions of the institution as defined in Long-Range Planning, 1976-81 and as modified in subsequent editions of the plan.

b. The present administrative and academic organization of the institution, including an up-to-date table of organization for the institution and each of its major units, as well as the names of persons holding principal administrative positions down to and including the departmental level. (The description of the academic organization of the institution contained in the 1978 edition of the plan should be checked carefully and any errors or omissions noted for correction.)

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

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 or sixth-year 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 2a 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, since a revised five-year plan for nursing education is being prepared as a separate but complementary document to Long-Range Planning, 1980-1985.

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 change budget, or (4) some combination of the foregoing.

d. Status reports on all new degree programs currently authorized to be planned.

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. Confirmation or revision of the information concerning student services at the institution which appeared in the last edition of the long-range plan and any changes in emphasis, programs, services, and organizational structure, which are planned for the next five years in the student affairs area at the institution.

g. A description of the scope of anticipated degree-related extension activities (on-campus and off-campus) for this planning period, and a list of any degree programs that are to be proposed to be offered during 1981-82 through degree credit extension instruction and the location of all such courses and programs.

h. Other pertinent matters as the institution may wish to incorporate into its proposed plan.

3. The proposed institutional plans should be in this office by April 20, 1980. 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 two 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 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, 1980-1985, will be prepared for submission to the Committee on Educational Planning, Policies, and Programs of the Board of Governors by September 1. It is anticipated that the Committee will make its report and recommendations to the

Board of Governors during the fall, 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 December, 1980.

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

William Friday

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

INSTRUCTIONS

REQUEST FOR AUTHORIZATION TO PLAN A NEW DEGREE PROGRAM

All requests for authorization to plan a new degree program must follow the attached format. Add such additional information as you may desire.

Review of the request cannot be completed until all information is submitted. Six copies are required for review.

If more than one request is filed, please indicate the priority of each request, 1 through n, at the upper right hand corner of the face sheet. If the request is in addition to other requests for authorization to plan new degree programs already under review, indicate the priority of this new request among the group of active requests from your university and any changes in the priorities of requests currently under review.

Each request should be signed by the Chancellor.

REQUEST FOR AUTHORIZATION TO PLAN A NEW DEGREE PROGRAM

THE UNIVERSITY OF NORTH CAROLINA

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 persons responsible for planning, the planning schedule, and the expected date of submission of a program proposal if planning authorization is approved.
5. To what extent could the proposed new program be operated within already existing resources?
 - a. funds
 - b. facilities
 - c. personnel - faculty and administrative
6. Please complete the attached Racial Impact Statement relating to the expected contribution of this proposed new program to the further elimination of racial duality in The University of North Carolina.

cellor:

INSTRUCTIONS

RACIAL IMPACT STATEMENT

A racial impact statement is required with each new request for authorization to plan or to establish a new degree program or track, regardless of level of education, type of program, or institution.

QUESTION #1 - Include such items as special program features which might attract minority-presence students and faculty, special minority-presence student recruitment plans, etc.

QUESTION #2 - Indicate numbers of students projected in the boxes provided, for example - 25. For baccalaureate programs include total enrollment for all levels of training or education.

For traditionally white constituent institutions "minority" means non-white students. For traditionally black constituent institutions "minority" means non-black students.

QUESTION #3 - Include results of previous enrollment, recruitment, surveys or other activities which form the basis for the enrollment projections made in Question #2.

RACIAL IMPACT STATEMENT

Institution: _____ (date) _____

Program/Track Title: _____

HEGIS Code #: _____ Level: B___ M___ I___ First Professional___ D___

Proposed date of initiation of new program/track: _____ (month) _____ (year)

Please indicate the expected contribution of this proposed new program to the further elimination of racial duality in The University of North Carolina as follows:

1. Describe how this proposed program/track would increase minority presence at your institution.

2 Project total student enrollment by numbers and race. Complete the chart below:

	<u>YEAR 1</u>	<u>YEAR 2</u>	<u>YEAR 3</u>	<u>YEAR 4</u>
	(19__-__)	(19__-__)	(19__-__)	(19__-__)
Majority	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Minority	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTALS	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

3. Indicate the basis for the projected student enrollment:

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, 1980-85: _____

Request planning authorization be withdrawn

by Long-Range Planning, 1980-85: _____

Date: _____

Signature: _____

Chancellor