

ADMINISTRATIVE MEMORANDUM

SUBJECT Long-Range Planning of The University
of North Carolina; 1986-1991

NUMBER 241

DATE September 23, 1986

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 October 10, 1985, called for the next revision to be completed during 1986-87 for the period 1986-1991.

III. Long-Range Planning, 1984-1989.

The next edition of the long-range plan will cover five years, 1986-87 through 1990-91. 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

All commitments in the Consent Decree of July, 1981, continue in effect through December 31, 1986. More specific instructions concerning these matters will be provided for you before the end of December.

B. Special planning studies and activities already mandated that will influence the long-range planning process include:

1. A review and evaluation of programs in the academic discipline division of Communications.
2. A review and evaluation of programs in the academic discipline division of Foreign Languages.
3. A review and development of policies regarding the delivery of instruction via telecommunications.
4. A review of the higher educational needs of military personnel.
5. The report of the Board of Governors Task Force on the Preparation of Teachers.

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 those special studies noted above that will have been completed during this academic year.

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. See Attachment 1.

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 1985. (A copy of the form is included as Attachment 2.)

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, 1984-89, until the submission of materials in response to this memorandum in February, 1987.

d. Status reports on all new degree programs currently authorized to be planned. The form for such reports is included as Attachment 3.

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. Updated charts showing the current organization of the institution, as of November 15, 1986. One such chart, illustrating primarily the academic organization of the institution will be printed in the long-range plan. An example of such a chart and instructions as to format are provided in Attachment 6 below. These charts should be submitted to this office by December 10, 1986.

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 between July 1, 1987 and June 30, 1988 through degree credit extension instruction and the location of all such courses and programs. A format for responding to this requirement is included as Attachment 4.

h. A report on research institutes or centers. With each revision of the long-range plan of The University, the Director of each research institute or center is to submit a report to the President through the appropriate Chancellor or Chancellors. Administrative Memorandum #145, dated January 12, 1981, Section 10 indicates the specific information to be provided. Institutions are encouraged to review the need for the continuation of currently authorized institutes and centers and should plan for the termination of any of them that may have outlived their usefulness. A list of existing research institutes and centers is included as Attachment 5. (This section does not apply to the Agricultural Research Service.)

i. 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 February 20, 1987. 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, 1986-1991, will be prepared for submission to the Committee on Educational Planning, Policies, and Programs of the Board of Governors by August 1, 1987. 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 November, 1987.



C. D. Spangler, Jr.

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 for New Degree Program Previously Authorized for Planning
- Attachment 4: Degree-related Extension Instruction Long-Range Planning, 1986-1991.
- Attachment 5: Research Institutes and Centers
- Attachment 6: Institutional Organizational Charts

REQUEST FOR DISCONTINUATION OF DEGREE PROGRAM
OR PROGRAM TRACK

Institution: _____

API 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

ATTACHMENT 2

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: _____

API Discipline Specialty Title: _____

API 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.
6. Estimate the number of students that would be enrolled in the program during the first year of operation. Full-Time _____ Part-Time _____

Chancellor: _____

STATUS OF NEW DEGREE PROGRAMS
PREVIOUSLY AUTHORIZED FOR PLANNING

Institution: _____

API 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, 1986-91: _____

Request planning authorization be withdrawn
by Long-Range Planning, 1986-91: _____

Date: _____

Signature: _____
Chancellor

DEGREE-RELATED EXTENSION INSTRUCTION

Long-Range Planning, 1986-1991

Projected course and program activity: July 1, 1987 - June 30, 1988

I. Degree-related coursesTitlesExpected EnrollmentProposed LocationsII. Degree-related ProgramsTitlesExpected EnrollmentProposed Locations

INTERINSTITUTIONAL RESEARCH INSTITUTES AND CENTERS
OF THE UNIVERSITY OF NORTH CAROLINA

- | | |
|--|---|
| <p>1. <i>Highway Safety Research Center</i> North Carolina A & T State University North Carolina State University *UNC-Chapel Hill</p> | <p>6. <i>Highlands Biological Station</i> Duke University North Carolina State University UNC-Chapel Hill Wake Forest University *Western Carolina University</p> |
| <p>2. <i>Triangle Universities Nuclear Laboratory</i> *Duke University North Carolina State University UNC-Chapel Hill</p> | <p>7. <i>Institute for Transportation Research and Education</i> The University of North Carolina and other not-for-profit organizations</p> |
| <p>3. <i>Water Resources Research Institute</i> East Carolina University *North Carolina State University UNC-Chapel Hill UNC-Wilmington</p> | <p>8. <i>Energy and Environmental Engineering Research Laboratory</i> Research Triangle Institute Duke University *North Carolina State University UNC-Chapel Hill</p> |
| <p>4. <i>Sea Grant College Program</i> East Carolina University *North Carolina State University UNC-Chapel Hill UNC-Wilmington</p> | <p>9. <i>Human Development Research and Training Institute</i> Appalachian State University UNC-Charlotte UNC-Chapel Hill UNC-Greensboro *Western Carolina Center Western Carolina University</p> |
| <p>5. <i>N.C. Agricultural Research Service</i> North Carolina A & T State University *North Carolina State University UNC-Greensboro</p> | |
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*Institution that serves as administrative unit.

INSTITUTIONAL RESEARCH INSTITUTES AND CENTERS AT THE CONSTITUENT INSTITUTIONS
OF THE UNIVERSITY OF NORTH CAROLINA

Appalachian State University
Bureau of Economic and Business Research

East Carolina University
Bureau of Business Research
Institute for Coastal and Marine Resources
Institute for Historical Research in
Tobacco

North Carolina A & T State University
Institute for Research in Human Resources
Rockwell Solid State Electronics Laboratory
Transportation Institute

North Carolina Central University
Desegregation Institute

North Carolina State University
Applied Energy Research Laboratory
Center for Communications and Signal
Processing
Computer Graphics Center
Center for Economic and Business Studies
Center for Electric Power Systems
Research
Center for Engineering Applications of
Radioisotopes
Center for Environmental Studies
Center for Occupational Education
Center for Precision Engineering
Center for Research in Mathematics
and Science Education
Center for Research In Scientific
Computation
Center for Rural Resource Development
Center for Sound and Vibration
Center for Transportation Engineering
Services
Center for Urban Affairs and Community
Services
Engineering Research Services Division
Furniture Manufacturing and Management
Program
Hodges Wood Products Laboratory
Industry Research Programs in Forestry
Institute for Manufacturing Systems
Engineering
Institute of Statistics
Materials Research Center
Minerals Research Laboratory
North Carolina Japan Center
Productivity Research and Extension Program
Southeastern Plant Environment Laboratories
Southern Forest Research Center
Veterinary Equine Research Center
Water Process Development Center

Pembroke State University
Native American Resource Center

The University of North Carolina at Asheville
Mossbauer Effect Data Center

The University of North Carolina at Chapel Hill
Cancer Research Center
Carolina Population Center
Center for Alcohol Research
Center for Environmental Medicine
Center for Health Promotion and
Disease Prevention
Center for Research in Accounting and
Auditing
Center for Research in Journalism and
Mass Communication
Center for Thrombosis and Hemostasis
Center for Urban and Regional Studies
Child Development and Research Institute
Biological Sciences Research Center
Frank Porter Graham Child Development
Center
Clinical Center for the Study of
Development and Learning
Cystic Fibrosis Center
Dental Research Center
Health Services Research Center
Highway Safety Research Center
Institute of Government
Institute for Environmental Studies
Institute for Marine Sciences
Institute for Research in Social Science
Institute for the Study of Private
Enterprise
L.L. Thurstone Psychometric Laboratory
Louis Harris Data Center
Multipurpose Arthritis Center
North Carolina Institute for Investment
Analysis
Program in Digestive Diseases and
Nutrition

The University of North Carolina at Charlotte
Center for Business and Economic Research
Urban Institute

The University of North Carolina at Greensboro
Center for Applied Research (Business and
Economics)
Center for Educational Research Evaluation
and Service
Family Research Center
Home Economics Center for Research

The University of North Carolina at Wilmington
Institute for Marine Biomedical Research

Western Carolina University
Center for Improving Mountain Living

INSTRUCTIONS CONCERNING ORGANIZATIONAL CHARTS

A. Charts to be Submitted

1. Academic Organization, including schools or colleges, academic departments, and centers and institutes. Closely related and supportive activities or offices such as library, admissions, registrar, computer center, and institutional research and planning should also be shown. Where applicable (ECU and UNC-CH), the academic organization chart should include both Academic Affairs and Health Affairs.

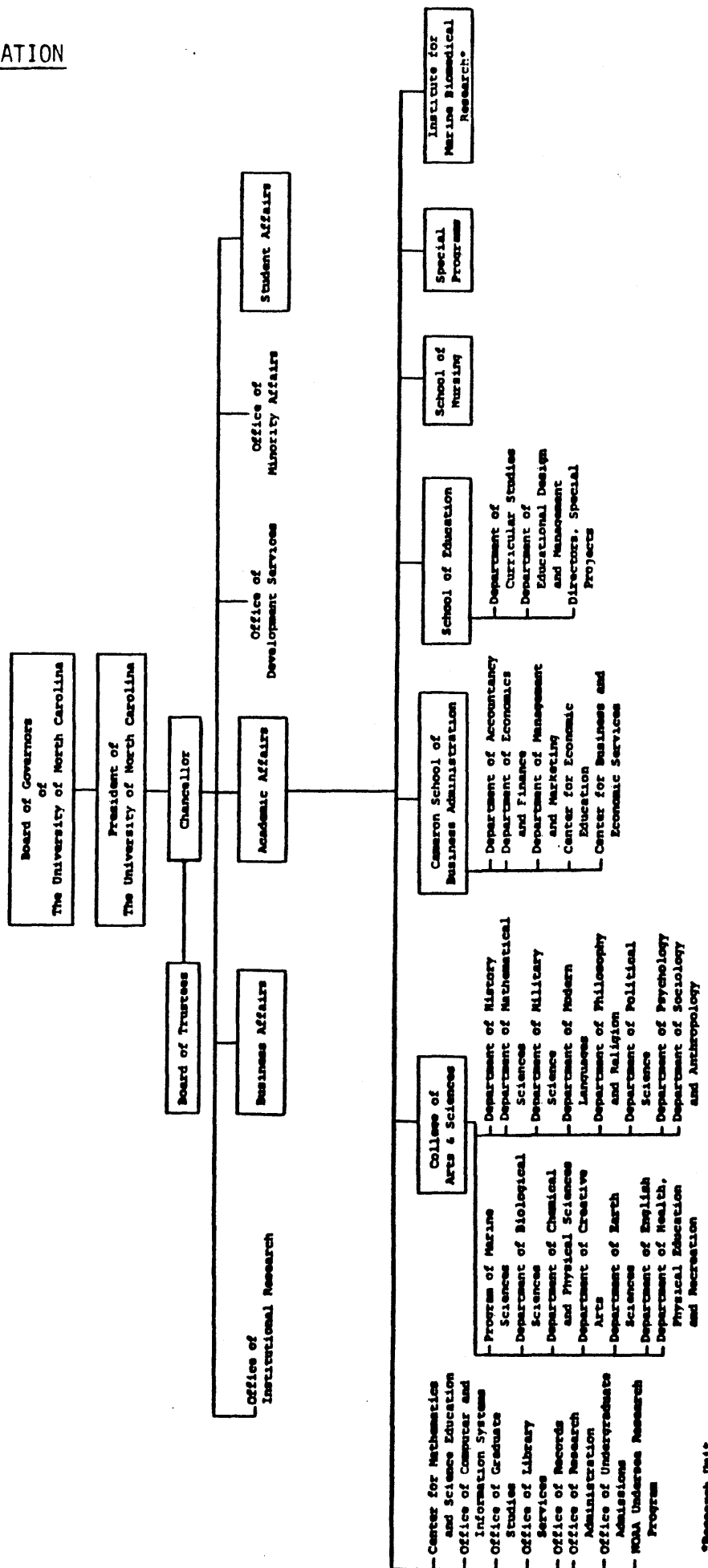
2. Similar charts for the major divisions headed by each of the other vice chancellors: Business/Finance, Student Affairs/Services, Development/Advancement, etc.

B. Format

A sample format for the Academic Organization charts is on the following page. Note that boxes are used sparingly and designate the Board of Governors, President, Board of Trustees, Chancellors, Vice Chancellors, and Deans. Note also that research units are marked with a single asterisk (*) and public service units with a double asterisk (**).

C. Charts should reflect the organizational arrangements as of November 15, 1986 and should be submitted by December 10, 1986. The remainder of the institutional planning proposal are to be submitted by February 20, 1987.

Academic Organizational Chart for the University of North Carolina at Wilmington, 1984



*Research Unit