THE UNIVERSITY OF NORTH CAROLINA

OFFICE OF THE PRESIDENT

ADMINISTRATIVE MEMORANDUM

SUBJECT Long-Range Planning, 1992-1997

NUMBER 318

DATE March 23, 1992

I. Introduction

Early in 1990, the President and the Board of Governors called for a comprehensive review and reassessment of current institutional mission statements and for the development of institutional plans for this decade. An administrative memorandum (number 287, dated March 6, 1990) and a supplementary memorandum from the President (dated August 7, 1990) provided instructions and guidelines for the process. Institutional responses were submitted to the President in January, 1991.

The proposed missions and related academic program development and organizational changes were reviewed by consultants and by the President and his staff. Their recommendations were then considered in detail by the Board of Governors' Committee on Educational Planning, Policies, and Programs, which presented its report to the Board in February, 1992.

By resolution, adopted on March 6, 1992, the Board approved the committee recommendations and requested the President

> ...to prepare, in consultation with the Chancellors, a draft of a revised long-range plan for the University of North Carolina for the period 1992-93 through 1996-97, which will include, among other things, a general statement of mission for the University, institutional mission statements and proposed academic program development in accordance with these recommendations.

The purpose of this memorandum is to outline a schedule and guidelines for that task.

II. Long-Range Planning, 1992-1997

The committee report, as adopted by the Board of Governors, provides a framework for a revised long-range plan for the University of North Carolina. The plan will cover the five-year period, 1992-93 through 1996-97. Since extensive proposals have been submitted and reviewed already, the supplementary material now needed to prepare the plan should focus primarily upon the recommendations contained in the committee's report to the Board.

A. Institutional Mission Statements

The institutional mission statements submitted to the President in 1991 varied widely in nature and format, ranging in length from a few sentences to several pages, and often reflected a proposed change in institutional classification. Other than to recommend a change in classification for two institutions, UNC-Asheville and UNC-Greensboro, the committee report did not speak to the precise wording of mission statements. For greater consistency and usefulness in planning, it will be necessary, in some instances, to distill further those institutional mission statements.

Since 1976, successive revisions of the University's long-range plan have contained an "Academic Program Plan" for each institution consisting of: (1) a general statement of educational mission, which indicates the appropriate Carnegie classification, the levels of degrees offered, and any special emphases or responsibilities; (2) a listing of authorized degree programs by level and by discipline division and specialty, which further defines the institution in terms of program array; (3) authorizations to plan or to discontinue academic degree programs; (4) any major organizational changes to be made; and (5) authorized and projected enrollment goals by level for the planning period.

The designation "Academic Program Plan" will be changed to "General Academic Mission" in the coming revision of the long-range plan. The first part of that section for each institution will again be a succinct and focused general statement of the basic educational mission of the institution. That brief statement should identify the type of institution according to the Carnegie definitions, the level of degrees conferred, and the relative emphasis placed upon the traditional purposes of instruction, research, and public service. That basic statement should be no more than, and preferably less than, one double-spaced, typed page.

In many instances, the proposed statement submitted in 1991 suffices with only minor changes in wording. An accompanying memorandum to each institution suggests what changes, if any, need to be made in the statement proposed in 1991. (See Enclosure #1.)

An institution may expand upon this summary of its basic mission in another broader statement consistent with the board-approved statement appearing in the long-range plan, to convey more fully its philosophy and purposes to various constituencies.

B. Proposed Academic Program Development

1. Authorization to Plan New Programs

a. New program planning authorizations which will be included in the revised long-range plan are identified in Part II, Section A, of the February report of the Committee on Educational Planning, Policies, and Programs to the Board of Governors. Institutions are authorized to proceed with the planning of those degree programs and degree program tracks while revision of the long-range plan is underway. (See Enclosure #1.)

With respect to these programs, the following additional information should be provided in response to this memorandum: (1) a description of the proposed program and its objectives; (2) an identification of the person responsible for the planning of the program; and (3) the proposed planning schedule and expected date of submission of a request to establish the program. (See Enclosure #2 for format.)

No request to establish any of these programs should be submitted until after the publication of the long-range plan in the fall of 1992. A determination of the adequacy of the resources available to establish these programs will be made by the President and the Board of Governors when the planning for each has been completed.

b. Part II, Section B, of the committee report identifies ten other program proposals for which recommendations may be presented to the Board of Governors only after specific conditions have been satisfactorily met. These programs may or may not be authorized for planning in the forthcoming revision of the long-range plan. If your institution has a program so identified, see Enclosure #1.

Reconfirmation of Previous Planning Authorizations

Institutions are to report on the status of those proposed new degree programs for which planning authorization has been granted in earlier years, indicating whether the previous authorization should be withdrawn or reconfirmed. (See Enclosure #3 for format.)

3. Programs to be Discontinued

A number of requests to discontinue current programs or program tracks have been received either in the planning materials submitted in 1991 or in the responses to our survey of programs with low enrollment and low productivity. List any additional academic degree programs recommended for discontinuation, indicating the effective date. (See Enclosure #4 for format.)

C. Enrollment Projections

Actual enrollments for 1991-92, estimated enrollments for 1992-93, and projected enrollments for the 1993-95 biennium and the 1995-97 biennium for the University as a whole and for each of the constituent institutions will be included in the revised plan. Each institution will be consulted during the preparation of the enrollment projections.

D. Reports on Institutes and Centers

A report on each research and public service institute or center should be submitted. The report should include the information indicated in Part III, Section K, of Academic Program Development Procedures, March 1992. One copy of each report is sufficient.

Also identify any institutes or centers recommended for discontinuation, indicating the proposed phase-out period and effective date of discontinuation.

E. Organizational charts

Each institution will submit an organizational chart showing primarily the academic structure of the institution. A sample chart indicating the format is attached as Enclosure #5.

Schedule

1. These additional planning materials should be submitted to the President by June 15, 1992. Five (5) copies are requested for review. Type the abbreviated name of the institution at the top of each page so that it may be identified easily. Loose-leaf binders or notebooks should be used for easy insertion or removal of pages.

Consultations will be held with the Chancellors or designated institutional representatives to clarify proposals or to fill gaps in information.

2. Following the review and evaluation of institutional materials, a draft plan for the University of North Carolina, 1992-1997, will be submitted to the Committee on Educational Planning, Policies, and Programs of the Board of Governors.

3. It is anticipated that the committee will make its report and recommendations to the Board of Governors in September, 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 the fall.