

ADMINISTRATIVE MEMORANDUM

SUBJECT Long-Range Planning 1994-99 (Supplement, 1996) NUMBER 361

DATE May 28, 1996

I. Introduction

Long-Range Planning, 1994-99 was adopted by the Board of Governors in November 1994. The schedule for future planning called for a revised plan to be adopted and published in 1995 in order to return to the normal cycle of revising the University's plan in odd-numbered years. However, the large number of special studies mandated by the 1995 session of the General Assembly preempted preparation and adoption of a 1995 revision.

The purpose of this memorandum is to provide a schedule and guidelines for preparation of a supplement to the 1994-99 plan. Instructions for the revision of the 1994-99 plan and adoption of *Long-Range Planning, 1998-2003* will be issued early next year.

II. Long-Range Planning, 1994-1999 (Supplement)

Since the current plan is to be revised next year, this supplement should address only those modifications that are modest or essential. The deadline for institutional submissions is intentionally short, as the supplement is intended to provide a brief "window of opportunity" for action on proposals that have accumulated since the last planning revision.

After appropriate consultation with the faculty, each chancellor will submit to the President any proposed revisions in the organization, academic program offerings, or the mission statement of the institution.

A. Institutional Mission Statements

Institutional missions were thoroughly reviewed during the 1990-92 mission review process, and revised mission statements that reflected the outcomes of that process appeared in *Long-Range Planning, 1992-97*. Mission statements were reviewed again in 1993 and revised as necessary to ensure that they gave "explicit recognition to the primary importance of teaching in the University," in conformity with policy adopted by the Board of Governors in the report *Tenure and Teaching in the University of North Carolina*.

Therefore it is not anticipated that institutional missions or institutional mission statements will require major revisions at this time. However, institutions may submit requests for minor changes in language that will improve or clarify the mission statement.

B. Proposed Academic Program Development

1. Authorization to Plan New Degree Programs

During 1994 and 1995 the Board of Governors conducted a thorough review of all degree programs to identify those of low productivity or low priority or which were "unnecessarily redundant." As a result of this review, a total of 104 academic degree programs and an additional 19 degree program tracks were discontinued. Revision of Section 2, General Statutes 116-11 (3), which outlines the Board of Governors' responsibilities with respect to academic programs, requires that the Board conduct such a review every two years.

The concern for academic productivity reflects both the fiscal constraints higher education is experiencing and the expectation that constituent institutions will be called upon to serve a growing number of traditional and nontraditional students in the next decade. Institutions considering requests to plan new programs should take these conditions into account and should also consider the growing potential of distance education and collaboration with sister institutions as alternative means of meeting new program demands in their respective regions. Since the 1994-99 plan will be revised in 1997, the program planning proposals submitted for this supplement should be limited to the most pressing and compelling cases.

Requests for authorization to plan any new academic degree programs must be submitted in accordance with *Academic Program Development Procedures* (July 1994). (See Enclosure #1 for format.)

2. 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 previously, indicating whether the previous authorization should be withdrawn or reconfirmed. Institutions with planning authorization outstanding for several programs should consider whether some of these requests should be withdrawn, especially if little progress in planning has been made and they intend to seek additional planning authorizations. (See Enclosure #2 for format.)

3. Programs to be Discontinued

Although institutions have recently conducted a thorough review of academic degree programs and will continue to review their programs on a biennial schedule, they are encouraged to propose the elimination of any additional degree programs or degree program tracks of low productivity or low priority. (See Enclosure #3 for format for requests to discontinue programs and tracks.)

C. Enrollment Projections

Institutions have recently received instructions regarding the development of long-range enrollment goals (Memorandum from the President to the Chancellors dated May 16, 1996). The reports are due by August 30, 1996. These enrollment goals should not be confused with the request that will be sent this summer for 1997-99 enrollment estimates for preparation of the 1997-99 expansion budget request.

D. Reports on Institutes and Centers

In accordance with Chapter 407, Section 1, Senate Bill 393, 1993 Session Laws, the Board of Governors is conducting a review of all research and public service institutes and centers. The report, due by February 1, 1997, will include "plans for program improvement, elimination, consolidation, or other modification, and for proposed reallocation of any savings." Because of this review, institutions will *not* be required to submit a separate report on research and public service institutes or centers for this supplement. However, requests for authorization to plan new institutes or centers, where the need is pressing and compelling, should be submitted in accordance with *Academic Program Development Procedures* (July 1994).

E. Organizational Charts

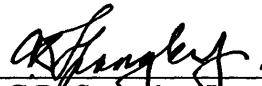
Each institution will submit an organizational chart showing primarily the academic structure of the institution. This should be an update of the chart appearing in *Long-Range Planning, 1994-99*. (See Enclosure #4 for chart format.)

III. Schedule

Planning materials should be submitted to the President by July 22, 1996. 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.

Following the review and evaluation of institutional materials, a supplement to the 1994-99 plan will be submitted to the Committee on Educational Planning, Policies, and Programs of the Board of Governors. It is anticipated that the committee will make its report and recommendations to the Board of Governors in the fall.


C.D. Spangler, Jr.

REQUEST FOR AUTHORIZATION TO PLAN A NEW DEGREE PROGRAM

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. Five (5) 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____ Prof. ____ D____

Proposed program is at a more advanced level than those previously authorized: Yes__ No__

Proposed program is in a new discipline division: Yes____ No____

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 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 PREVIOUS PLANNING AUTHORIZATIONS

(Complete 5 copies for each program previously authorized for planning but not yet established.)

DATE: _____

Constituent Institution: _____

API Discipline Specialty Title: _____

API Discipline Specialty Number: _____ **Level:** B _____ M _____ I _____ Prof. _____ D _____

Status of planning for the program: _____

Expected date for submission of a request to establish: _____

Planning authorization should be reconfirmed or extended: Yes _____ No _____

Planning authorization should be withdrawn: Yes _____ No _____

Chancellor (or designee): _____

REQUEST FOR AUTHORIZATION TO DISCONTINUE A DEGREE PROGRAM OR PROGRAM TRACK

Date: _____

Constituent Institution: _____

Instructions:

1. For all programs proposed for discontinuation simply list them below and indicate the proposed effective date.

API#	Level	Program or Track Title	Effective Date	Reason for Discontinuation

Chancellor (or designee) _____

INSTRUCTIONS CONCERNING ORGANIZATIONAL CHARTS

Each institution is asked to prepare and submit charts showing the organizational structure of the institution as of January 1, 1996.

A. Charts to be Submitted

1. Academic Organization, including schools and 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 organizational 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/Development, Development/Advancement, etc.

B. Format

Attached is a copy of the chart which appears in Long-Range Planning, 1994-99. Revise and update as necessary. Note that boxes should be 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 (**).

Please be sure that charts are clear, sharp and readable.