

ADMINISTRATIVE MEMORANDUM

SUBJECT: Revised Policies and Procedures for Planning
and Conducting Degree-Related Extension
Instruction Activities in The University
of North Carolina

NUMBER: 147

DATE: February 6, 1981

Over the past several months a special review of current policies and procedures related to degree-related extension instruction in The University of North Carolina has been completed. This review was initiated through Administrative Memorandum #121, dated August 1, 1979, which also provided interim guidelines and procedures for planning and conducting degree-related extension courses and programs.

This Administrative Memorandum sets forth revised policies and procedures for the planning and conduct of degree-related extension instruction activities in The University of North Carolina. These policies and procedures supercede all previous policies and procedures described in earlier Administrative Memoranda and long-range plans of The University prior to Long-Range Planning, 1980-1985.

INTRODUCTION

The principal mode of offering degree-related courses and programs in The University of North Carolina has been, and will continue to be, through regular on-campus, in-residence instructional activities. However, the demand for education beyond the confines of the campus and through alternatives to traditional instructional activities has steadily increased, especially among the professions--education, health affairs, business, engineering, and public affairs. Consequently, under special circumstances, instruction is offered off-campus, both degree-related and non-degree-related. In this regard, the Board of Governors has established procedures designed to initiate and operate extension instructional activities to assure that The University can be as responsive as possible to the needs of the people of North Carolina without diminishing the quality and effectiveness of its existing regular term, summer term, or other instruction programs. These procedures permit the Board of Governors and the President to fulfill their responsibilities to (1) assure that the academic standards of extension instruction activities are consistent with those maintained "on-campus," and (2) to see that wasteful and unnecessary duplication of effort and resources does not occur among the extension activities of the constituent institutions of The University.

A. DEFINITIONS

1. "Extension instruction" means either degree-related or non-degree-related instruction offered directly by an instructional unit or through an extension or other instructional division of the institution. Such offerings are primarily, but not exclusively, directed to groups external to the institution, and persons otherwise unable to take advantage of the regular term or summer term instructional program. Extension instruction may be given either on or off the campus. It includes avocational education, professional review and refresher courses, and various types of continuing education. Extension instruction activities consist of (a) degree-related extension courses, (b) degree-related extension programs, and (c) formal non-degree-related courses awarding continuing education credit in the form of Continuing Education Units (CEUs), which are not applicable or transferable toward the requirements for any degree programs.¹

2. "Degree-related extension course" means an individual degree-related course offered for credit outside the regular term or summer term program of the institution, either on- or off-campus.

3. "Degree-related extension program" means all of the formal education requirements, including residence requirements, necessary to qualify for a degree or certificate when offered outside of the regular term or summer term instructional program of an institution. Such programs typically are offered (a) on the campus of the institution, (b) at educational centers at military installations in North Carolina, (c) through contractual arrangements with another institution or agency to provide instruction at a given location, including graduate centers, and (d) through a "field-based degree program,"

¹Guidelines for the use of the Continuing Education Unit (CEU) are contained in Administrative Memorandum #134, January 22, 1980.

which is an arrangement by which an institution arranges to offer in a single given location, over a given period of time, the required sequence of courses for a particular degree program.

4. "Proposed site" means the county in which the proposed degree-related extension course or program is to be offered and all adjacent counties.

B. PRINCIPLES

The guiding principles for developing, conducting, and evaluating degree-related extension instruction activities in The University are as follows:

1. The responsibility for coordination and supervision of all degree-related extension instruction activities in The University rests with the Board of Governors and the President of The University of North Carolina.

2. The responsibility for the development, conduct and regular evaluation of specific degree-related extension instruction activities, courses and programs, rests with the constituent institutions and the academic administrative units of the constituent institutions offering the instruction.

3. The academic standards and quality of degree-related extension instruction activities shall be consistent with and comparable to the academic standards and quality of regular, on-campus instruction activity. The application and maintenance of academic standards is the responsibility of the academic unit of the institution offering the instruction.

4. In the course of planning and developing degree-related extension instruction activities, each constituent institution is responsible for coordination and cooperation with each of the other constituent institutions and other relevant organizations and agencies prior to seeking such authorization from the President as may be required to establish the activities.

N.B.: The policies and procedures contained in this Administrative Memorandum do not pertain to independent study for credit (correspondence courses). Independent study activities are conducted through the Independent Study Consortium of The University of North Carolina under an interinstitutional agreement among constituent institutions of The University. For information on Independent Study by Extension, contact the Director of the Office of Independent Study of the Extension Division at the University of North Carolina at Chapel Hill, 27514.

C. DEGREE-RELATED EXTENSION COURSES

1. In-state. The development and conduct of individual degree-related extension courses within the State of North Carolina is an institutional responsibility. Courses may be offered without prior approval of the President or the Board of Governors. However, before offering such courses off-campus, institutions shall ascertain whether comparable courses are being offered in the proposed site by contacting, in writing, the Chancellors (or their designees) of all constituent institutions of The University that are located in the proposed site, whether or not they are currently authorized to offer the proposed course. Each Chancellor should, in turn, acknowledge the contact, in writing, within 15 days, signifying agreement or disagreement with the proposed activity.

In cases where two or more institutions are unable to reach agreement on a proposal to offer a course, then the matter should be referred to the President.

Whenever feasible, arrangements should be made to use the facilities and resources, such as media centers, computer centers, libraries, laboratories, etc., of other constituent institutions in the conduct of degree-related extension courses

All degree-related extension courses shall be reported to the President of The University within 15 days after their initiation. The report will include the catalog course number and title, the HEGIS discipline specialty code and title, the course level, the name and faculty rank of the instructor(s), the location of the offering, the course beginning and ending dates, certification that the required coordination has occurred, and projected course enrollment. The format in Appendix A shall be used for reporting each such course.

2. Out-of-state. Degree-related extension courses may not be offered outside of North Carolina (including international) by any constituent institution without prior approval of the President. Requests for such authorization must be submitted at least 15 days before the proposed initiation date of out-of-state courses following the format in Appendix B.

D. DEGREE-RELATED EXTENSION PROGRAMS

1. In-state. Degree-related extension programs may not be offered off-campus in North Carolina without prior approval of the President. Before initiating such programs, an institution shall submit a program proposal to the President for approval. Such proposals shall follow the guidelines offered for requesting authorization to initiate degree-related extension programs included in Appendix C and must be submitted at least 45 days prior to the proposed initiation date of the program. Before submitting any proposals, institutions shall ascertain whether a comparable degree-related extension program is being offered by another constituent institution in the proposed site. Such ascertainment must be accomplished by contacting, in writing, the Chancellors (or their designees) of all constituent institutions of The University that are:

a. located in the proposed site (whether or not they are currently authorized to offer the proposed program as indicated in the current Academic Program Inventory), and

b. currently offering comparable degree-related extension programs in the proposed site (as indicated in the current Inventory of Authorized Degree-Related Extension Programs). Each Chancellor must, in turn, acknowledge the contact, in writing, within 15 days, signifying agreement or disagreement with the proposed activity. If, after every effort is made to reach agreement, two or more institutions are unable to agree on a proposal to offer a program, then the matter should be referred to the President citing the points of disagreement.

Whenever feasible, arrangements should be made to use the facilities and resources, such as media centers, computer centers, libraries, laboratories, etc., of other constituent institutions in the conduct of degree-related extension programs.

2. Out-of-state. Degree-related extension programs may not be offered outside of North Carolina (including international) by any constituent institution without prior approval of the President. Requests for authorization must be submitted at least 45 days prior to the proposed initiation date using the proposal format included in Appendix C.

E. GENERAL PREREQUISITES FOR INITIATING DEGREE-RELATED EXTENSION INSTRUCTION

1. The course or program which is being proposed as a degree-related extension activity must be authorized in the current catalog or academic program inventory of the constituent institution requesting authorization to offer the degree-related extension instruction.

2. A proposed degree-related extension course or program may be offered through an extension administrative unit or other special instructional division of the institution, but instruction and supervision must be provided by the same college, school or department offering the course or program in regular term or summer term instruction on-campus. The appropriate dean or department head will be accountable for all qualitative aspects of its extension operations, and for insuring that standards for awarding credit are consistent with requirements for credit that must be met by students enrolled in the program as regular term or summer term students.

3. Degree-related extension courses and programs will be authorized for operation only in instances of clear and demonstrable need. Prior authorization to engage in activities designed to determine need is not required. However, if a needs assessment is to be conducted in a proposed site which includes one or more constituent institutions, the Chancellor of the constituent institution preparing to determine need should so advise the President and the appropriate Chancellor(s) before initiating the needs assessment.

4. Master's and intermediate level degree-related programs (including sixth-year Certificate of Advanced Study [C.A.S.] programs) will be authorized for extension operation only if they have been authorized and operating during regular term at the institution proposing the extension activity for a period of at least two years prior to the proposed initiation of the extension operation. Exceptions may be made in instances of clear and demonstrable need.

F. PROGRAM REQUIREMENTS

1. Admissions requirements. Admissions requirements for degree-related extension programs must be comparable to the admissions requirements of the same programs offered on-campus or in regular or summer term.

2. Residence requirements. Each institution must state clearly its policy regarding the number of credit hours applicable to a graduate degree program offered through extension which must be earned in residence by regular term or summer term instruction on its campus, or at an authorized graduate center, and must clearly define "residence."

3. Faculty.

a. The faculty assigned to teach degree-related extension courses or programs must be members of the regular staff of the institution offering the courses or programs and fully qualified to teach as determined by the academic department offering the course or program and/or part-time faculty identified specifically to assist as extension instruction faculty members. Graduate level instructors, whether full-time or part-time faculty members of the institution, must hold membership on the graduate faculty of that institution in accordance with the institutional regulations and policies governing such membership.

b. Part-time faculty must possess the same or equivalent qualifications as the regular faculty and should be approved formally by the academic department through which credit is to be awarded. Institutions shall adopt policies relating to the employment of part-time faculty which insure that the use of such faculty does not result in diminished academic quality or in conflicts of interest.

c. Full-time faculty members shall be limited to a degree-related extension teaching load of one course per semester in addition to their regular full-time, on-campus teaching load.

d. Faculty members employed to teach only extension courses or programs must have a significant involvement in or orientation to the ongoing planning of policies and programs of the academic unit offering the extension courses or programs to assure their familiarity with the programs.

4. Supervision and counseling.

a. Each institution must make available adequate academic advising, supervisory, and counseling services necessary to students enrolled in degree-related extension courses and programs. These services must be comparable to the quality and availability of such services provided to students enrolled in courses and programs offered in regular term or summer term.

b. Each institution must have available a set of written policies, procedures, and guidelines pertaining to degree-related extension courses and programs which includes information on admissions, requirements for completion of the extension programs or courses, fees, and any other pertinent information. This information should be provided without cost to each student enrolling in such programs.

G. ACCOUNTABILITY

1. Proposed degree-related courses or programs may be offered through extension instruction only with the concurrence of the responsible dean or department head of the college, school or department as to the adequacy of faculty and other instructional resources, such as library resources, laboratory, computer resources, media support services, and classroom facilities, required for the proposed instructional activity.

2. The dean or department head of the college, school or department responsible for the proposed degree-related extension course or program is responsible to see that the teaching format for the extension instruction is comparable to the teaching format used for regular term and summer term or that it has been developed or revised specifically for extension instruction.

3. Degree extension programs will be authorized by the President for a maximum initial period of five years. At the completion of the fourth year of operation, and if the institution wishes to continue the program beyond the fifth year, an evaluation of the first four years of the program must be completed by the institution and the results submitted to the President with the request for authorization to continue the program. If a program is discontinued after five years, currently enrolled students will be continued through completion of their programs of study but no new students may be enrolled.

H. FINANCING DEGREE-RELATED EXTENSION INSTRUCTION

Although there is generally no distinction made with respect to the value of the academic credit awarded to the student for regular session on-campus instruction and for the same instruction offered by extension, there is an important distinction in the State's practice regarding the support of the two types of instruction. The regular session on-campus students are included in the count of "regular session" students which provides the principal basis for requesting and receiving financial support from the State's General Fund. Students enrolled in these degree credit extension instructional offerings are not included in the count of "regular session" students for whom the institutions receive State-appropriated support. The present policy of the State is that appropriated funds are provided for basic, continuing administrative support of extension activities, while the general instructional costs of degree credit instruction are met from student fees. Only in a few instances have exceptions to this policy of receipts support been authorized.

Degree-related extension instruction offered outside the regular session on- and off-campus, that is, the provision of instruction for credit to persons who are not enrolled as resident students, will continue to be funded in large measure from student receipts.

However, in instances where there is a clear and special need for graduate level degree-related extension instruction, a particular institution or group of institutions may be called upon by the Board of Governors to fill the need through the establishment of a graduate center at a constituent institution or other educational facility. Such graduate centers will be planned and established on the initiative of the President and the Board of Governors, in accordance with appropriate standards for initiating graduate programs. Appropriate funding arrangements for each graduate center will be established by the Board of Governors.

I. REPORTING RESPONSIBILITIES

1. Within 90 days of the end of each fiscal year each institution shall provide a report on the degree-related extension courses and programs actually conducted and completed during the previous fiscal year (July 1-June 30). The annual report should follow the format provided in Appendix D.

2. The initial inventory of authorized degree-related extension programs in The University of North Carolina is attached as Appendix E. It shall be the responsibility of the President to maintain and annually update and publish this inventory.

3. The President shall report annually to the Committee on Educational Planning, Policies, and Programs of the Board of Governors providing information on the numbers, types, and locations of extension instruction activities in The University.

J. REVIEW CRITERIA

In reviewing requests for authorization to initiate or to continue degree-related extension programs the President will also consider:

1. the impact of the proposed extension instruction on the quality and capacity of existing academic programs at the requesting institution,
2. the need for the extension instruction,
3. the impact of the proposed extension instruction on other institutions or agencies in the area and in the State as a whole, and
4. the compatibility of the proposed extension activity with the mission and long-range plan of the requesting institution and with the mission and long-range plan of The University of North Carolina.

K. PARTICIPATION OF CONSTITUENT INSTITUTIONS IN INTERINSTITUTIONAL ARRANGEMENTS

1. Policy. Procedures for authorizing and offering degree-related extension courses and programs rely heavily on the initiative of constituent institutions in informing and working closely with other constituent institutions in the locale where the proposed instructional activity will be carried out and where proposed courses and programs are comparable to those offered by neighboring institutions. Institutions will exercise great care that their extension instruction activities are not unproductive, excessively costly or unnecessarily duplicative. Where appropriate, constituent institutions will combine their efforts to serve citizens whose educational needs are not being met in a timely or effective manner.

In the event two or more constituent institutions are unable to develop or project an adequate cooperative plan to offer a program to a particular group or organization or in a particular locale, the President shall review the proposed instructional plan, using such advice as may be necessary from existing councils, committees, or consultants, and decide upon a proper course of action.

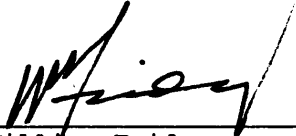
2. Procedures. The President of The University of North Carolina must approve the participation of a constituent institution in any formal interinstitutional arrangements which provide for cooperative instructional activities and operation or use of facilities and academic resources between and among public and nonpublic institutions of higher education, including community colleges and technical institutes, public school systems, and any cooperative association of such educational institutions formed as a corporation or consortium.

The President shall review and approve the terms and conditions of participation in any interinstitutional or interagency organization, including

the charter and bylaws thereof, and may thereafter authorize a chief administrative officer of the constituent institution, or the officer's designee, to participate on the governing body of such a corporation.

Any commitments, including facilities and resources, by The University or a constituent institution to any interinstitutional arrangement, association or corporation shall be made in compliance with all provisions of law and regulations governing The University or the constituent institution and shall not exceed funds appropriated or otherwise lawfully available to The University or to the constituent institution thereof in the fiscal year in which the commitments are made.

The financial standing and operations of any interinstitutional arrangement, association or corporation shall be subject to post-audit by the State Auditor.



William Friday

- Attachments:
- Appendix A - Report of initiation of a degree-related extension course in North Carolina
 - Appendix B - Request for authorization to offer a degree-related course out-of-state
 - Appendix C - Request for authorization to establish a degree-related extension program
 - Appendix D - Annual report (degree-related extension courses and programs actually conducted and completed during previous fiscal year)
 - Appendix E - Inventory of authorized degree-related extension programs in UNC

REPORT OF INITIATION OF A DEGREE-RELATED EXTENSION COURSE

THE UNIVERSITY OF NORTH CAROLINA

To: *Academic Affairs Division*
UNC General Administration
P.O. Box 2688
Chapel Hill, NC 27514

Date: _____

1. Institution: _____

2. Course Title: _____

Catalog Course Number: _____ Level: _____

HEGIS Title: _____ HEGIS Code #: _____

3. Location: _____
(city) *(county)*

4. Course Beginning Date: _____ Ending Date: _____

5. Instructor: _____

Faculty Rank of Instructor: _____

6. Enrollment (headcount): _____

7. Necessary coordination with other constituent institutions of
The University of North Carolina has been completed in accordance
with UNC Administrative Memorandum #147, February 6, 1981.

(signature of Chancellor or designee)

This report should be submitted within 15 days after the initiation of the course.

REQUEST FOR AUTHORIZATION TO OFFER A DEGREE-RELATED COURSE OUT-OF-STATE

THE UNIVERSITY OF NORTH CAROLINA

This request is to be submitted at least 15 days before the proposed initiation date to:

*Academic Affairs Division
UNC General Administration
P.O. Box 2688
Chapel Hill, NC 27514*

Institution: _____

Course Title: _____

Catalog Course Number: _____ Course Level: _____

HEGIS Code and Title: # _____

Location: _____ Projected Enrollment: _____
(headcount)

Beginning Date: _____ Ending Date: _____

Indicate special reasons why this course should be offered outside the state.

(date)

(signature of Chancellor or designee)

REQUEST FOR AUTHORIZATION TO ESTABLISH A DEGREE-RELATED EXTENSION PROGRAM

THE UNIVERSITY OF NORTH CAROLINA

Submit 6 copies of the program proposal to: Academic Affairs Division
UNC General Administration
P.O. Box 2688
Chapel Hill, NC 27514

Institution: _____ Date: _____

Program Title: _____ HEGIS Code #: _____

Program Level: _____ Proposed Date of Initiation: _____

Proposed Site: _____
(city) (county) (state)

1. Program description:
2. Faculty (include brief curriculum vitae):
3. Document need for the program:
4. Projected enrollment: Year 1 _____ Year 3 _____
(headcount) Year 2 _____ Year 4 _____
5. Source(s) of financial support for proposed program:
6. Plan for evaluating the proposed program: (Include measurable program objectives, criteria, standards and measures to be used to evaluate the program. Include a timetable or schedule for the evaluation.)
7. Required coordination with other constituent institutions of The University has been completed in accordance with the procedures set forth in UNC Administrative Memorandum #147, February 6, 1981.

Signatures:

Dean or Department Head of unit offering program _____

Director of Extension Education Division _____

Chief Academic Officer _____

Chancellor (or designee) _____

This request should be submitted at least 45 days prior to the proposed date of initiation.

REPORT OF OFF-CAMPUS DEGREE-RELATED EXTENSION INSTRUCTION ACTIVITIES

THE UNIVERSITY OF NORTH CAROLINA
FY 198__ (July 1, 198__ through June 30, 198__)

This report is to be submitted annually by October 1 for all off-campus degree-related extension programs and courses completed during the previous fiscal year (July 1-June 30) to:

*Academic Affairs Division
UNC General Administration
P.O. Box 2688
Chapel Hill, NC 27514*

Attach additional pages as necessary.

Constituent Institution: _____ Date: _____

Name of Individual Preparing Report: _____ Title: _____

PART I: FIELD-BASED DEGREE PROGRAMS

A. IN-STATE

HEGIS Title	HEGIS Code #	Degree Level	School/Department	Location	Duration	Enrollment (Headcount)
Undergraduate:						

Graduate:

PART I: FIELD-BASED DEGREE PROGRAMS (CONTINUED)

B. OUT-OF-STATE

HEGIS Title	HEGIS Code #	Degree Level	School/Department	Location	Duration	Enrollment (Headcount)
-------------	--------------	--------------	-------------------	----------	----------	------------------------

Undergraduate:

Graduate:



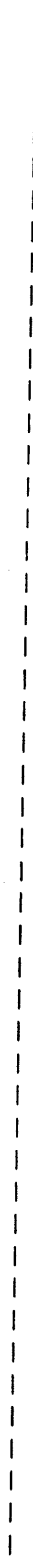
PART II: INDIVIDUAL DEGREE-RELATED EXTENSION COURSES

A. IN-STATE

HEGIS Title	HEGIS Code #	Degree Level	School/Department	Location	Duration	Enrollment (Headcount)
-------------	--------------	--------------	-------------------	----------	----------	------------------------

Undergraduate:

Graduate:



PART II: INDIVIDUAL DEGREE-RELATED EXTENSION COURSES (CONTINUED)

B. OUT-OF-STATE

HEGIS Title	HEGIS Code #	Degree Level	School/Department	Location	Duration	Enrollment (Headcount)
-------------	--------------	--------------	-------------------	----------	----------	------------------------

Undergraduate:

Graduate:

INVENTORY

AUTHORIZED DEGREE-RELATED EXTENSION PROGRAMS
THE UNIVERSITY OF NORTH CAROLINA

FEBRUARY 6, 1981

HEGIS #	TITLE	LEVEL	LOCATION
ASU: 0501	Business & commerce, general	M	Winston-Salem
0514	Secretarial studies	B B	Charlotte Gastonia
0802	Elementary education, general	M M M	Shelby Winston-Salem Gastonia
0808	Special education, general	M M	Hickory Statesville
0827	Educational administration	M M,I M I	Salisbury Winston-Salem Hickory Charlotte
0830	Reading education	M	Charlotte
0836	Driver & safety education	M M	Charlotte Asheville
0838/ 0839	Business, commerce, & distributive education; Industrial arts, vocational & technical educ.	B B B B B B B B	Salisbury Wilkesboro Dobson Marion Spindale Hickory Elkin Statesville
0897	Educational media	M	Charlotte
1601	Library science	M	Statesville
2207	Political science & government	M M	Hickory Winston-Salem

ECU: 0802	Elementary education, general	M M M	Camp Lejeune Cherry Point Fayetteville
0826	Counselor education	M	Ft. Bragg

	HEGIS #	TITLE	LEVEL	LOCATION
ECU: (con't.)	0827	Educational administration	M	Fayetteville
	2102	Public administration	M	Camp Lejeune
			M	Cherry Point
			M	Ft. Bragg
2207	Political science & government	B	Camp Lejeune	
		B	Cherry Point	
		M	Ft. Bragg	
2208	Sociology	B	Camp Lejeune	
		B	Cherry Point	
FSU:	0401	Biology, general	B	Ft. Bragg
	0506	Business management & administration	B	Ft. Bragg
	0802	Elementary education, general	B	Ft. Bragg
	1223	Medical laboratory technology	B	Ft. Bragg
	1501	English, general	B	Ft. Bragg
	1701	Mathematics, general	B	Ft. Bragg
	2001	Psychology, general	B	Ft. Bragg
	2205	History	B	Ft. Bragg
	2207	Political science and government	B	Ft. Bragg
			B	Smithfield
B			Goldsboro	
2208	Sociology	B	Ft. Bragg	
NCSU:	0807	Adult & continuing education	M	Ft. Bragg
	0901	Engineering, general	M	Asheville
M			Wilmington	
M			Greenville	
M			Fayetteville	
M			Raleigh and 14 county area	

	HEGIS #	TITLE	LEVEL	LOCATION
UNC-CH:	0808	Special education, general	M	Fayetteville
	0827	Educational administration	I	Carthage
	1202	Hospital & health care administration	M M M	Fayetteville Greenville Hickory
	1214	Public health	M M	Greenville Hickory
	1292	Dental auxiliary teacher education	B	Greensboro
	1601	Library science	M	Portsmouth, VA
	2104	Social work & helping services	M M M M M M	Charlotte Durham Fayetteville Hickory Wilson Winston-Salem

C-C:	0801	Education, general	M M M M M	Cabarrus Co. Union Co. Stanly Co. Anson Co. Lee Co.
	0925	Engineering technologies	B	Winston-Salem
	4901	General liberal arts	B	Albemarle

WCU:	0506	Business management & administration	B M	Morganton Shelby
	0802	Elementary education	M M M M	Andrews Spindale Hickory Cleveland Co.
	0829	Curriculum & instruction	I	Charlotte
	0830	Reading education	M	Hickory
	0838	Business, commerce, & distributive education	B	Jamaica
	4988	Applied science & technology	B	Morganton
