





# SETTING SYSTEM GOALS FOR AFFORDABILITY AND EFFICIENCY

October 13, 2016

# Meeting Purpose, Overview, & Deliverables

---

**Purpose:** Discuss BOG Affordability and Efficiency draft goals.

## **Overview:**

- Update on Strategic Planning Process
- Recap Prior Meetings/Discussions
- Discuss Goals
- Next Steps

## **Deliverables:**

1. Agree on 2-3 goals.
2. Agree on metric for each goal.

*Agreement on specific targets are not necessary at this time.*





# UPDATE ON STRATEGIC PLANNING PROCESS

# Common Framework

---

Four basic typologies for a measurable goal:

- 1. A topical area:** What aspect of the issue will the strategic goal focus on?
- 2. A goal:** What is the broad outcome that the system should be pushing for?
- 3. A metric:** What is the quantity we will measure to judge progress on the broad goal?
- 4. A target:** What change in the metric, and in what time frame, will we consider a success?

# After Today We Need to:

---

- Affirm our Topical Areas
- Identify one Goal for each Topical Area
- Identify Metric for each Goal

We do NOT need to set specific targets yet.



# RECAP

## ***Approved Definition of Affordability and Efficiency***

---

*Article IX, Section 9 of the North Carolina State Constitution requires that the General Assembly shall provide that “the benefits of The University of North Carolina and other public institutions of higher education, as far as practicable, be extended to the people of the State free of expense.”*

*That constitutional mandate encourages a working compact among the state’s elected officials, taxpayers, and the University to deliver the University’s multifaceted mission at the highest levels of quality in a cost-effective manner without regard to a student’s ability to pay.*



# Original Topic Areas

---

## Goal: Academic/Student Costs

### *Strategies:*

- Cap on tuition and fee increases
- Financial aid and student debt
- Faster time to degree

## Goal: Operational Costs/Efficiencies

### *Strategies:*

- Construction costs
- Public-private partnerships
- Back office coordination/consolidation
- Operating flexibility
- Personnel costs

# From September to Now:

---

- Expanded focus on student costs to include cost of attendance rather than just tuition and fees
- Narrowed efficiency goal to focus on operating flexibility as the primary strategy with the understanding that the other items discussed are areas that would benefit from the increased flexibility
- Move to recommended goal framework that includes topical area, goal, and metric



# DRAFT GOALS WITH METRICS

# Draft Goals with Metrics for Review/Discussion

---

## Affordability

*Topical area:* The cost of attending The University of North Carolina has been increasing faster than the median income in North Carolina has been rising.

*Goal:* Offer education of equal or higher quality at a cost that is attainable to students and families in North Carolina.

*Possible metric:* Ensure that increases in the percent increase in cost of attendance, specifically tuition and fees, on-campus room and board, and books and supplies, is tied to changes in median family income/CPI/average annual wages.

## Efficiency

*Topical area:* The University of North Carolina is charged to fulfill its mission through the efficient use of available resources to ensure the highest quality of service to the citizens of the State.

*Goal:* To pursue and utilize increased operational flexibility for the benefit of the educational, research, and public service missions of the University of North Carolina.

*Possible metric:* Increase operational flexibility for the University of North Carolina.





# NEXT STEPS

# Next Steps

---

- Consider Stakeholder Feedback
  - Survey Results
  - Campus Forums
  - Feedback from Legislators
  - Comments from Fellow Board Members
- Strategic Planning Committee Review & Discussion
- Analysis of Data and Trends to Inform Potential Targets



# Stakeholder Input as of Monday, October 10<sup>th</sup>

Over 2,000 total responses  
2 responses from Legislators

