

OUR TIME, OUR FUTURE UNC STRATEGIC DIRECTIONS PLAN 2013-2018

QUARTERLY IMPLEMENTATION DASHBOARD REPORT

Version: January 8, 2014

Prepared for: Board of Governors Strategic Planning Committee
Submitted by: President Tom Ross

The following reports are provided to the Board of Governors' Strategic Planning Committee in order to assist members in monitoring UNC's progress toward accomplishing the Strategic Plan goals:

1. **Dashboard Summary Report:** Top level, one-page report summarizing the overall status of the Strategic Plan project portfolio at the Goal level.
2. **Dashboard Drill-Down Report:** Detailed report providing implementation information for each Action Item in the Strategic Plan. Information is organized according to its Implementation Category (Completed, Underway or in planning with existing resources, Funded by \$3M Strategic Plan budget, On-hold due to insufficient resources)
3. **Attachment – Strategic Plan Action Items:** In order to create a concise implementation status report, the verbiage associated with Action Items was condensed. As appropriate, Action Items were also consolidated. For reference, this attachment provides the full description of each Action Item, as reflected in the Strategic Directions Plan, and also specifies the Action Items that have been consolidated.

STRATEGIC DIRECTIONS DASHBOARD REPORT: SUMMARY
For Period Ending December 31, 2013

Strategic Plan Goals		Schedule	Strategic Plan Budget	% Complete
1	Setting Degree Attainment Goals Responsive to State Needs			
	Key Accomplishments and/or Issues:	Held successful College Application Week for participating high schools.		
2	Strengthening Academic Quality			
	Key Accomplishments and/or Issues:	Published expected learning outcomes for each degree program on campus' websites.		
3	Serving the People of North Carolina			
	Key Accomplishments and/or Issues:	Progress has been made on identifying campus professionals and industry representatives to assist in defining requirements for the experiential learning and internship portal.		
4	Maximizing Efficiencies			
	Key Accomplishments and/or Issues:	Completed residency determination working sessions and plan for implementation.		
5	Ensuring an Accessible and Financially Stable University			
	Key Accomplishments and/or Issues:	Established top-quality shared services advancement staff.		

Metrics

Schedule / Budget:  Ahead of schedule, or on track; under budget, or on target  Generally on track; at risk for going off schedule or over budget  Schedule off-track or budget overrun

% Complete: 0%  ; 1%-25% complete  ; 26%-50% complete  ; 51%-75% complete  ; >76% complete 

STRATEGIC DIRECTIONS DASHBOARD REPORT: DRILL-DOWN
For Period Ending December 31, 2013

Implementation Category: Completed

Action Item		Project Lead(s)	Overall Performance	% Complete	Schedule	
					Start Date	End Date
Military And Veteran Population						
1.E.4	Establish academic advising centers at Fort Bragg and Camp Lejeune	Rhinehardt		100%	06/03/13	10/31/13
1.E.7	Create a website	Rhinehardt		100%	04/13	09/17/13
Set Core Competencies For General Education Programs						
2.B.5	Ensure all general education courses meet transfer-level SACS standards	Ortega		100%	06/13	08/13
Become A National Leader In The Assessment Of Student Learning Gains						
2.C.1.a	Ensure campuses report to the Voluntary System of Accountability (VSA) annually	Henz		100% (for 2013)	03/13	04/13
2.C.1.b	Publish expected learning outcomes for each degree program on campus' websites [New development since last quarterly report]	Henz		100%	08/13	10/10/13
Implement A Comprehensive E-Learning Strategy						
2.D.5.f	Benchmark online course completion rates and student learning outcomes against the traditionally delivered equivalent.	Henz		100%	07/01/13	09/01/13
2.D.4.a	Course Redesign: Develop RFP that provides incentives to faculty to leverage technology in the redesign of courses (Annually, beginning September 2013)	Chapman		100%	06/13	07/31/13
Help Meet The Growing Healthcare Needs Of The State Through Innovative Research						
3.D.4	Develop doctor of nursing practice (DNP) programs in UNC	Ortega/Brown		100%	06/03/13	07/29/13

Implementation Category Color Coding

 Completed
  Underway or in planning with existing resources
  Funded by \$3M Strategic Plan Budget
  On hold

NOTE: Start and end dates have shifted for a few Action Items. Where this is the case, the baseline dates appear in parentheses.

STRATEGIC DIRECTIONS DASHBOARD REPORT: DRILL-DOWN For Period Ending December 31, 2013						
Implementation Category: Underway or in Planning with Existing Resources						
Action Item		Project Lead(s)	Overall Performance	% Complete	Schedule	
					Start Date	End Date
Strengthen and Diversify a Changing Pipeline						
1.A.1	Implement Gaining Early Awareness and Readiness for Undergraduate Programs (GEAR UP)	Dixon		36%	07/17/13	07/11/19
1.A.2	Grow College Application Week to serve high schools with low-income populations	Dixon		38%	03/01/13	03/31/14
Military And Veteran Population						
1.E.5	Streamline admission/transfer policies	Rhinehardt/ Dixon		50%	06/29/13	02/1/14
1.E.6	Incentivize faculty to develop flexible online courses	E-Learning VP	Work plan to be developed (original start date was 4/13; to commence when E-Learning VP starts on 1/13/14)			
Improve Graduate Student Education						
1.F.1	Support existing Professional Science Masters programs (dev. of new programs is on hold)	Brown		21%	07/13	12/14
Assess The Impact Of Minimum Admissions Requirements						
2.A.1	Complete analytics research as well as a comprehensive assessment of the predictive utility of current GPA and test score standards	Cohen-Vogel/ Henz	N/A (not started)	0%	04/07/14 (7/29/13)	10/03/16 (2/24/15)
2.A.2	Track those who fail to gain admission	Cohen-Vogel/ Henz		17%	03/01/13	12/31/14
Set Core Competencies For General Education Programs						
2.B.1	Complete Comprehensive Articulation Agreement	Ortega		50%	07/29/13 (11/12)	11/28/14

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STRATEGIC DIRECTIONS DASHBOARD REPORT: DRILL-DOWN
For Period Ending December 31, 2013

Implementation Category: Underway or in Planning with Existing Resources

Action Item		Project Lead(s)	Overall Performance	% Complete	Schedule	
					Start Date	End Date
2.B.2	Appoint a General Education Council, and consider key areas for inclusion in a core set of system-wide general education competencies	Ortega		80%	04/01/13 (03/13)	01/31/14
2.B.4	Use council review as basis for discussion, develop framework for student learning	Ortega		29%	07/01/13 (11/13)	03/31/15
2.B.6	Update and expand course equivalency library, and ensure campus curricula is compatible with the equivalency library and the CAA by 2015	Dixon/Ortega		13%	07/01/13	10/30/15
Become A National Leader In The Assessment Of Student Learning Gains						
2.C.1.c	Make licensure pass rates more accessible	Cohen-Vogel		37%	04/13	02/14
2.C.1.d	Develop and regularly report on indirect student learning outcome measures	Cohen-Vogel	N/A (not started)	0%	01/30/15	01/30/15
2.C.1.e	Publish Employment Security Commission employment and income data by major on publicly available web sites	Cohen-Vogel/Henz		80%	05/2013	12/13
2.C.2.b	By January 2014, receive recommendations from the General Education concerning common core competencies and other key information	Ortega		83%	07/01/13	01/31/14
2.C.2.e	By May 2015, identify steps necessary to bring to scale a comprehensive competency-based measurement approach across UNC campuses	Ortega	Work plan is being developed. Work does not commence until 2015.			

Implementation Category Color Coding



Completed



Underway or in planning with existing resources



Funded by \$3M Strategic Plan Budget



On hold

STRATEGIC DIRECTIONS DASHBOARD REPORT: DRILL-DOWN

For Period Ending December 31, 2013

Implementation Category: Underway or in Planning with Existing Resources

Action Item		Project Lead(s)	Overall Performance	% Complete	Schedule	
					Start Date	End Date
2.C.2.f	Beginning in 2013-14 academic year, provide resources to one or more campuses to pilot an e-portfolio approach to documenting student learning across general education/major.	Stewart		20%	09/02/13	3/31/15
2.C.2.g	By September 2015, bring to scale across the system a competency-based approach to assessing general education core learning outcomes and determine whether or not to adopt a common e-portfolio platform and framework	Ortega	Work plan to be developed.			
2.C.2.h	As appropriate, join national efforts (currently led by the state of Massachusetts) to develop a robust database for comparing campus learning outcomes with those of their peers	Ortega	Work plan to be developed. Project does not commence until 2015.			
2.C.3	Develop and implement a system-wide Prior Learning Assessment (PLA) program	Ortega	N/A (not started)	0%	09/01/14	08/29/16
Implement A Comprehensive E-Learning Strategy						
2.D.2	Extend UNC's reach to new audiences	Ross/ E-Learning VP		75%	07/29/13	04/14 (12/30/13)
2.D.4.c	Deliver faculty development that focuses on formative assessment and learning analytics in teaching (annually)	Chapman/ O'Hara		55% (83% ; decreased due to consolidation of work plans)	06/01/13	5/1/2014 for '13-'14 academic year (11/13/13)

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STRATEGIC DIRECTIONS DASHBOARD REPORT: DRILL-DOWN
For Period Ending December 31, 2013

Implementation Category: Underway or in Planning with Existing Resources

Action Item		Project Lead(s)	Overall Performance	% Complete	Schedule	
					Start Date	End Date
2.D.4.e	President, in consultation with the UNC Faculty Assembly, will appoint a working group to develop and recommend a University-wide process for ensuring faculty have the skills required to develop and deliver high-quality online coursework	Chapman/ O'Hara		67%	06/03/13	12/31/13
2.D.5	Initiate and implement primary market research on key target audiences, develop RFP, award contract with May 2014 due date	Ortega/ Chapman/ O'Hara		75%	07/29/13	08/29/14
2.D.6	Launch UNC Online marketing campaign	E-Learning VP	Work plan to be developed when E-Learning VP starts on 1/13/14			
2.D.10	Expand UNC Online Exchange for World Languages	Chapman	Work plan is being developed			
Prepare More Higher-Quality Teacher And School Leaders						
2.F.1.a	Update market research, renew campus growth plans, assess campus productivity	Chapman	N/A (not started)	0%	10/01/14 (07/29/13)	06/30/14 (09/30/14)
Convert Discovery Into Innovation						
3.B.5	Increase effectiveness of REACH NC as a portal to our campuses	Thornton		38%	07/29/13	02/28/14
Serve the Needs of Our State, Regions and Communities Through Active Engagement						
3.C.1	Develop Annual Engagement Report	Boney		25%	07/29/13	08/25/14

Implementation Category Color Coding



Completed



Underway or in planning with existing resources



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On hold

STRATEGIC DIRECTIONS DASHBOARD REPORT: DRILL-DOWN
For Period Ending December 31, 2013

Implementation Category: Underway or in Planning with Existing Resources

Action Item		Project Lead(s)	Overall Performance	% Complete	Schedule	
					Start Date	End Date
3.C.6	Review UNC Center for Public Television	FitzGerald		20%	10/1/13	5/12/14
Mission Review and Refinement						
4.A.1	Review all campus mission statements	Ross/Ortega		20%	07/29/13	11/08/13
Operational and Administrative Savings						
4.B.1	Maintain or implement shared services in the following areas:					
4.B.1.a	Residency determination	Craig/Byers		50%	10/31/13 (06/03/13)	12/31/15 (10/31/13)
4.B.1.b	Internal audit	Perusse/Craig		93%	06/03/13	06/30/15 (12/13/13)
4.B.1.c	FAFSA review and financial aid verification	Perusse/Craig		60%	07/01/13	06/30/15 (02/28/2014)
4.B.1.d	Information technology infrastructure	Pruitt/Leydon		18%	07/30/13	01/15/15
4.B.2	Strategic sourcing	Perusse/Craig		31%	07/29/13	12/31/14
4.B.3	Non-instructional personnel costs	Perusse	N/A (not started)	0%	03/31/14 (11/01/13)	03/31/14
4.B.4	Improve business practices and eliminate redundant processes	Perusse/Craig		20%	07/15/13	10/15/14

Implementation Category Color Coding



Completed



Underway or in planning with existing resources



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On hold

STRATEGIC DIRECTIONS DASHBOARD REPORT: DRILL-DOWN
For Period Ending December 31, 2013

Implementation Category: Underway or in Planning with Existing Resources

Action Item		Project Lead(s)	Overall Performance	% Complete	Schedule	
					Start Date	End Date
4.B.5	Secure energy savings	Pruitt	N/A (not started)	0%	03/31/14 (11/13)	03/31/14
Active Portfolio Management						
4.C.1	Adopt system-wide guidelines for instructional productivity	Ortega/ Dixon		57%	04/13	03/14
4.C.3	Defragment select program islands and satellites through consolidation	Ortega	Work plan is being developed			
Honor North Carolina’s Constitutional Mandate of Low Tuition and Fees						
5.A.1	Develop a revised tuition and fee plan	Ross/Perusse		75%	07/29/13	06/30/13 (11/08/13)
5.C.2	Enhance private fundraising: Augment campus-based major gifts staffing	Perusse		0%	01/01/14	01/17

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On hold

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STRATEGIC DIRECTIONS PLAN DASHBOARD REPORT: DRILL-DOWN								
For Period Ending December 31, 2013								
Implementation Category: Funded by Strategic Plan Budget								
Action Item		Project Lead(s)	Overall Performance	% Complete	Schedule		Strategic Plan Budget (FY 2013-2014)	
					Start Date	End Date	Planned	Actual (through November)
Focus Area: Early Warning System								
1.B.1	Implement student success initiatives, including early warning systems	Dixon		61%	07/29/13	10/30/15	\$200,000	\$0
Focus Area: Non-Traditional Student Initiatives (Part-Way Home Students, Military, Transfers)								
1.C.1	Recruit students who have stopped-out from a UNC campus and provide support to guide returning students in readmission process	Dixon		17%	07/29/13	08/01/18	\$420,000	\$0
1.E.3	Establish system-level support and logistical assistance	Rhinehardt		100%	06/03/13	Ongoing	\$80,000	\$0
1.E.4	Establish academic advising centers at Fort Bragg and Camp Lejeune	Rhinehardt Included in “Completed” section and also retained here for budget tracking purposes		100%	06/03/13	10/31/13		

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For Period Ending December 31, 2013

Implementation Category: Funded by Strategic Plan Budget

Action Item		Project Lead(s)	Overall Performance	% Complete	Schedule		Strategic Plan Budget (FY 2013-2014)	
					Start Date	End Date	Planned	Actual (through November)
Focus Area: College Learning Assessment								
2.C.2.a	Pilot use of revised College Learning Assessment (CLA) on five UNC campuses	Henz		71%	03/01/13	04/01/14 (Spring 2014)	\$200,000	\$198,000
Focus Area: Alumni and Employer Survey								
2.C.4.a	By May 2014, complete an alumni satisfaction survey. Conduct alumni surveys at 1-year, 5-year, 10-year, and 20-year intervals after graduation.	Henz		71%	07/29/13	05/30/14	\$200,000	\$0
2.E.1	Initiate a biennial employer satisfaction survey	Henz/Boney	N/A (not started)	0%	07/29/13 (11/01/13)	09/30/15 (10/31/15)		
Focus Area: Comprehensive Distance Education Plan for Student Pipelines								
2.D.3	Develop and deliver up to ten new competency-based distance-delivered general education courses and MOOCs.	Ortega/Chapman/O'Hara		17%	09/02/13	09/30/14	\$300,000	\$0
Focus Area: Course Redesign								
2.D.4.a	Develop RFP that provides incentives to faculty to leverage technology in the redesign of courses (annually, beginning 9/13)	Chapman/O'Hara Included in "Completed"		100%	06/13	07/31/13	\$500,000	\$0

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STRATEGIC DIRECTIONS PLAN DASHBOARD REPORT: DRILL-DOWN
For Period Ending December 31, 2013

Implementation Category: Funded by Strategic Plan Budget

Action Item		Project Lead(s)	Overall Performance	% Complete	Schedule		Strategic Plan Budget (FY 2013-2014)	
					Start Date	End Date	Planned	Actual (through November)
		section and also retained here for budget tracking purposes						
Focus Area: Teacher Quality Research								
2.F.2	Strengthen teacher quality, expand outcome-based research, report annually to BOG	Chapman		50%	07/29/13	02/27/15 (8/29/14)	\$200,000	\$200,000
Focus Area: Student Data Mart								
4.E.1	Create the Student Data Mart	Cohen-Vogel		46%	07/29/13	08/24/15	\$200,000	\$77,008
Focus Area: Shared Services								
5.C.1	Enhance private fundraising: Develop top-quality, centralized shared staffing	Perusse		60%	07/29/13	08/31/14	\$300,000	\$52,035
3.A.8	Defense Applications Group	Rhinehardt		25%	07/01/13	06/30/14	\$200,000	\$50,649
N/A	Strategic Plan Project Management Support	FitzGerald		N/A	Ongoing		\$200,000	\$24,079
TOTAL BUDGET							\$3,000,000	\$601,771

Implementation Category Color Coding



Completed



Underway or in planning with existing resources



Funded by \$3M Strategic Plan Budget



On hold

STRATEGIC DIRECTIONS DASHBOARD REPORT: DRILL-DOWN
For Period Ending December 31, 2013

Implementation Category: On Hold

Action Item		Project Lead(s)
Strengthen and Diversify a Changing Pipeline		
1.A.3	Expand the Minority Male Mentoring Program	Dixon
1.A.4	Build on success of EDUMetric data and accountability [Shifted from Underway to On Hold, Nov. 2013]	Dixon
1.A.5	Evaluate Mathematics and Science Education Network (MSEN) Pre-College Program	Chapman/ Dixon
1.A.6	Expand number of students participating in the UNC Academic Summer Bridge/Retention Program	Dixon
Improve retention and graduation rates		
1.B.2	Increase number of courses offered in the summer	Dixon
1.B.3	Performance Funding Model	Henz/Pruitt/ Cohen-Vogel
Part-Way Home Students		
1.C.3	Hire academic advisors	Dixon
1.C.4	Create support programs to assist students returning to complete degree	Dixon
Community College Transfer Pipeline		
1.D.3	Create Transfer and Adult Student Success offices	Dixon
Military And Veteran Population		
1.E.1	Provide early resident status	Rhinehardt
1.E.2	Develop a system-wide recruiting strategy for the military-affiliated student population	Rhinehardt/ Dixon/O'Hara
1.E.8	Create and utilize faculty and staff development tools	Rhinehardt
Improve Graduate Student Education		
1.F.2	Grow doctoral enrollment in programs	Brown
1.F.3	Improve degree completion rates	Brown
1.F.4	Recruit entrepreneurially-minded graduate students	Brown
Set Core Competencies For General Education Programs		
2.B.8	Develop system for continuously updating course equivalency portal	Cohen-Vogel/Henz

Implementation Category Color Coding



Completed



Underway or in planning with existing resources



Funded by \$3M Strategic Plan Budget



On hold

STRATEGIC DIRECTIONS DASHBOARD REPORT: DRILL-DOWN
For Period Ending December 31, 2013

Implementation Category: On Hold

Action Item		Project Lead(s)
Implement A Comprehensive E-Learning Strategy		
2.D.1	Eliminate distance education tuition charges for full-time on-campus students	Perusse
2.D.4.b	Develop RFP that provides incentives for faculty to pilot the development of online competency-based courses.	Ortega/ Chapman/ O'Hara
2.D.5.d	Through RFP process to UNC campuses and faculty, design courses and initial degree programs responsive to results of market research.	E-Learning VP
2.D.5.e	Facilitate implementation of a portfolio of distance-delivered programs responsive to needs of adult learners, including military personnel and veterans, part-way home students, and transfer students.	E-Learning VP
2.D.7	Develop and market a fully online inter-institutional undergraduate degree	E-Learning VP
2.D.8	Expand the number of 2+2 programs delivered via distance education	E-Learning VP
2.D.8.a	Launch aggressive marketing campaign to promote availability of existing 2+2 programs	E-Learning VP
2.D.8.b	Enhance existing 2+2 online degree inventory with programs identified as high-interest/high-need by market research	E-Learning VP
2.D.9	Pilot a series of competency-based online post-baccalaureate certificate programs	E-Learning VP
2.D.9.a	Plan and begin initial development of post-baccalaureate certificate programs	E-Learning VP
2.D.9.b	Fully develop and launch three online competency-based post-baccalaureate programs matched to specific workforce and economic development needs.	E-Learning VP
Reduce Attempted Hours To Degree Through More Comprehensive Advising		
2.E.2	Electronic advising support software	Dixon
2.E.2.a	To facilitate seamless transfer, explore scaling electronic advising solution to include the North Carolina Community College System.	Dixon/ Cohen-Vogel
2.E.2.b	Hire additional professional and academic career advisors and provide staff and other resources to support high-quality faculty advising.	Dixon/Henz
2.E.2.c	Implement strategies for assessing and improving student satisfaction with academic and career services	Dixon
2.E.2.d	Through RFP to UNC campuses and faculty, pilot a series of post-baccalaureate certificate programs that are matched to specific economic needs/employer demands within the state	E-Learning VP/ Thornton/Boney

Implementation Category Color Coding



Completed



Underway or in planning with existing resources



Funded by \$3M Strategic Plan Budget



On hold

STRATEGIC DIRECTIONS DASHBOARD REPORT: DRILL-DOWN
For Period Ending December 31, 2013

Implementation Category: On Hold

Action Item		Project Lead(s)
Prepare More Higher-Quality Teacher And School Leaders		
2.F.3	Provide support for early-career teachers and school leaders	Chapman
2.F.3.a	Design implementation strategy for bringing NC New Teacher Support Program to full scale	Chapman
2.F.3.b	Begin implementation of fully scaled New Teacher Support Program	Chapman
2.F.3.c	Complete implementation of the fully scaled program	Chapman
2.F.3.d	Initiate development of a school leadership support program	Chapman
Invest In Game-Changing Research And Scholarship That Solves Problems Of North Carolina-And The World		
3.A.1	Form six consortia in areas of excellence, identify opportunities, recruit and retain talent, and assess infrastructural needs	Boney/Brown
3.A.2	Hire, reward, and retain critical faculty in areas of excellence	Ortega
3.A.2.a	Hire key faculty	Ortega
3.A.2.b	Reward and retain existing faculty	Ortega
3.A.2.c	Provide professional development and proposal support	Ortega/Brown
3.A.3	Provide competitive start-up funding and facilities	Brown/Perusse
3.A.4	Connect campuses throughout the world	Boney
3.A.5	Expand professional science master's programmatic support activities	Brown
3.A.6	Recruit highly-entrepreneurial graduate students and post docs	Brown
3.A.6.a	Create a focused, time-limited competitive fund to encourage campuses to develop new undergraduate entrepreneurship initiatives for non-business majors	Brown
3.A.6.b	Support 60 President's Graduate Fellows who would receive two years of support to attend UNC campuses and pursue their interests	Brown
3.A.6.c	Provide support each year for ten President's Postdoctoral Fellows, who would receive one year of support to further develop promising ideas or technologies	Brown
3.A.7	Grow the number of superstar STEM students	Ortega
Convert Discovery Into Innovation		
3.B.1	Establish Collaboration Seed Fund	Boney/Brown

Implementation Category Color Coding



Completed



Underway or in planning with existing resources



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On hold

STRATEGIC DIRECTIONS DASHBOARD REPORT: DRILL-DOWN
For Period Ending December 31, 2013

Implementation Category: On Hold

Action Item		Project Lead(s)
3.B.2	Develop new Innovation Discovery Teams	Boney/Brown
3.B.3	Move forward promising early-stage ideas through proof-of-concept fund	Boney/Brown
3.B.4	Advance ideas ready for commercialization through investment	Boney/Brown
Serve the Needs of Our State, Regions and Communities Through Active Engagement		
3.C.2	Prepare “job ready” students through experiential internships [Shifted from Underway to On Hold, December 2013]	Thornton/Boney
3.C.3	Encourage development of innovative continuing education and post-baccalaureate programs	Ortega
3.C.4	Support UNC research and scholarship on culture, tourism, and the creative economy	Boney/Brown
3.C.5	Create new center for applied public policy	Boney/Brown
Help Meet The Growing Healthcare Needs Of The State Through Innovative Research		
3.D.1	Establish a Health Care Redesign Task Force	FitzGerald
3.D.2	Expand AHEC	Ortega
3.D.2.a	New residencies	Ortega
3.D.2.b	Additional community-based training	Ortega
3.D.2.c	Dental housing	Ortega
3.D.2.d	Center for Rural Health Innovations	Ortega
3.D.3	Provide education and training for the next generation of pharmacists	Ortega
3.D.3.a	Expand the clinical preceptor base to support early student immersion in the patient care environment	Ortega
3.D.3.b	Add 20 new pharmacy residency positions	Ortega
3.D.3.c	Recruit a tenure-track faculty member to lead planned Center of Excellence in Pharmacy Practice (CEPP)	Ortega
Active Portfolio Management		
4.C.4	Pursue broader and more fundamental uses of online instruction	E-Learning VP
Incentivize Savings Practices		
4.D.1	Amend carry-forward statutes to create a Savings Incentive Program	Perusse
Enhanced Data Analytics		
4.E.2	Implement UNC Wilmington’s Predictive Analytics Project across other UNC campuses	Pruitt

Implementation Category Color Coding



Completed



Underway or in planning with existing resources



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On hold

STRATEGIC DIRECTIONS DASHBOARD REPORT: DRILL-DOWN
For Period Ending December 31, 2013

Implementation Category: On Hold

Action Item		Project Lead(s)
4.E.2.a	Cost allocation analytics	Pruitt
4.E.2.b	Enrollment management analytics	Cohen-Vogel/ Henz
4.E.2.c	Business analytics	Pruitt
Program Monitoring, Evaluation and Implementation		
4.F.1	Expand the capacity of UNC FIT	Craig
4.F.2	Bolster the Office of Institutional Research	Ortega/ Cohen-Vogel
Sustain the College Foundation of North Carolina		
5.B.1	Sustain College Foundation	Perusse/Moretz/Ortega
Address Repair and Renovation Needs		
5.D.1	Create a consistent and sustainable funding stream to better manage the state's capital assets	Perusse

Implementation Category Color Coding



Completed



Underway or in planning with existing resources



Funded by \$3M Strategic Plan Budget



On hold

ATTACHMENT: STRATEGIC PLAN ACTION ITEMS

In order to create a concise implementation status report for the Strategic Directions Plan, the verbiage associated with Action Items was condensed. As appropriate, Action Items were also consolidated. For reference, this attachment provides the full description of each Action Item, as reflected in the Strategic Directions Plan, and also specifies which Action Items were consolidated (for this information, refer to the last section of the document).

1. SETTING DEGREE ATTAINMENT GOALS RESPONSIVE TO STATE NEEDS

STRENGTHEN AND DIVERSIFY A CHANGING PIPELINE

- 1.A.1 Implement Gaining Early Awareness and Readiness for Undergraduate Programs (GEAR UP) to improve college preparedness of high school graduates, and deliver on the goals set for that grant program.
- 1.A.2 Continue to grow College Application Week to serve all eligible high schools so that first-generation and low-income students have the information and resources necessary to apply to higher education institutions.
- 1.A.3 Expand the Minority Male Mentoring Program
- 1.A.4 Build on success of the EDUMetric data and accountability.
- 1.A.5 Evaluate Mathematics and Science Education Network (MSEN) Pre-College Program outcomes to determine next steps with program enhancements and potential expansion.
- 1.A.6 Expand the number of students served and number of campuses participating in the UNC Academic Summer Bridge and Retention Program.

IMPROVE RETENTION AND GRADUATION RATES

- 1.B.1 Implement the student success initiatives, created by the Faculty Assembly and recommended by the Academics First Steering Committee, that are designed specifically to increase retention, student success, and timely degree completion. These include, for example, early warning systems and standards for increased grade point requirements for satisfactory academic progress.
- 1.B.2 Increase number of courses offered in the summer to help narrow the degree completion gap of underrepresented students and reduce time to degree for all students.
- 1.B.3 Performance funding model

PART-WAY HOME STUDENTS

- 1.C.1 Recruit students who have stopped-out from a UNC campus with at least 90 earned hours and a 2.0 GPA or higher.
- 1.C.2 Provide support to guide returning students in the readmission process.
- 1.C.3 Hire academic advisors to assist students with navigating the University and serve as an ombudsman between academic departments and students.
- 1.C.4 Create support programs to assist students returning to complete their degree. Increase academic advising by faculty.

COMMUNITY COLLEGE TRANSFER PIPELINE

- 1.D.1 Complete revision of the Comprehensive Articulation Agreement between UNC and the NCCCS.
- 1.D.2 Create a transcript warehouse to improve the efficient transfer of course credit between UNC and NCCCS and among UNC campuses. [Related to "Enhance Data Analytics"]
- 1.D.3 Create Transfer and Adult Student Success offices at each UNC campus.

MILITARY AND VETERAN POPULATION

- 1.E.1 Provide early resident status to certain non-resident veteran students who expect to establish formal residency. Prior to FY 2011-12, the federal Post 9/11 GI Bill capped tuition payments based on the highest in-state tuition in a given state. Beginning in FY 2011-12, tuition is capped at the actual in-state tuition at public institutions of higher education, lowering the amount of tuition covered for most nonresident students. Allowing the University flexibility to confer early resident status would eliminate this barrier to veteran students.
- 1.E.2 Develop a system-wide recruiting strategy for the military-affiliated student population to include custom academic pathways, academic success contracts, targeted collateral material, and other best practices. The General Administration shall provide publication and marketing support to UNC institutions targeting military populations for enrollment in courses and degree programs.
- 1.E.3 Establish system-level support and logistical assistance for UNC institutions that are recruiting, enrolling, and graduating military-affiliated students.
- 1.E.4 Establish successful academic advising centers at Fort Bragg and Camp Lejeune.
- 1.E.5 Streamline admission and transfer policies for consistency in determining residency and value of credit.
- 1.E.6 Incentivize faculty to develop flexible online courses that can be taken outside the normal semester system to meet degree requirements. [Related to e-Learning. See Section 2.D.]
- 1.E.7 Create a website with clear information about veteran and Department of Defense tuition benefits, academic credit articulation, academic programs, admissions, and student services.
- 1.E.8 Create and utilize faculty and staff development tools (such as Virginia Commonwealth University's "Green Zone" and the Center for the Deployment Psychology's "UC4" program) to nurture a culture of acceptance and support for military-affiliated students on UNC campuses.

IMPROVE GRADUATE STUDENT EDUCATION

- 1.F.1 Support existing and develop new Professional Science Master's programs (see section 3) and other industry-responsive programs.
- 1.F.2 Grow doctoral enrollment in programs aligned with state and campus strategic goals by providing the resources sufficient to attract and retain them, including tuition remissions and graduate research assistantships, and faculty and laboratory support (see section 3)
- 1.F.3 Improve degree completion rates and time to degree completion through the development of centrally supported campus-based professional development and career advising programs.

- 1.F.4 Recruit entrepreneurially-minded graduate students (see section 3) will result in an increase in graduate program enrollment, improvements in graduate program graduation rates, and an increase in the percentage of graduates choosing to remain and work in North Carolina.

2. STRENGTHENING ACADEMIC QUALITY

ASSESS THE IMPACT OF MINIMUM ADMISSIONS REQUIREMENTS

- 2.A.1 Complete analytics research to determine likely impacts on student success had the new minimum admissions requirements been applied to past cohorts.
- 2.A.2 Develop a process for tracking those who fail to gain admission to UNC under new standards to determine if, and where, they begin post-secondary education and whether and how soon they ultimately enter a UNC institution.
- 2.A.3 Complete a comprehensive assessment of the predictive utility of current GPA and test score standards on the retention and graduation rates of future cohorts, and analyze whether different, additional, or weighted measures of student academic preparation should be included in the minimum admission requirement policy.

SET CORE COMPETENCIES FOR GENERAL EDUCATION PROGRAMS

- 2.B.1 Complete revision of the Comprehensive Articulation Agreement, consistent with timeline submitted by UNC and NCCCS to the Joint Legislative Education Oversight Committee.
- 2.B.2 Appoint a Council composed of faculty and chief academic officers to undertake a comprehensive review of existing general education programs across all 16 degree-granting institutions and recommend a set of core competencies that will clarify and strengthen learning outcomes. (Council to be appointed by March 2013; recommendations and analysis received no later than January 2014)
- 2.B.3 Consider the following for inclusion in a core set of system-wide general education competencies, recognizing that general education is not limited to these areas and will be supplemented by learning outcomes aligned with each institution's mission: Critical thinking and quantitative analysis; Scientific inquiry; Communication skills; Historical and social perspectives; Human expression and creativity; Information and technology literacy; and Global and cultural awareness, diversity, and citizenship.
- 2.B.4 Use results of council review as basis for discussion of a common set of core general education competencies and value outcomes, as well as the proposed tools and methodologies that will be used to measure them. (January 2014-May 2014) Initiate pilot projects to refine the proposed quantitative measures of student learning and to develop appropriate and cost-effective test administration protocols. (Fall 2014).
- 2.B.5 By December 2013, ensure that all general education courses at all UNC institutions meet transfer-level quality SACS accreditation standards (6).
- 2.B.6 Update and expand current course equivalency library (Transfer Navigator) to include a search function not only by course name and title, but also by minimum course objectives and competencies. (2016-2017)

- 2.B.7 By fall 2015, ensure that any changes to campus curricula will be assessed for compatibility with the equivalency library and Comprehensive Articulation Agreement (CAA) before implementation.
- 2.B.8 Develop system for continuously updating course equivalency portal. (January 2017 – May 2017)

BECOME A NATIONAL LEADER IN THE ASSESSMENT OF STUDENT LEARNING GAINS

- 2.C.1 Increase access to and the transparency of current student learning outcomes assessments.
 - 2.C.1.a Ensure all campuses report all required information to the Voluntary System of Accountability (VSA) in a timely manner.
 - 2.C.1.b Publish expected learning outcomes for each degree program on each campus' website.
 - 2.C.1.c Make licensure pass rates, currently reported annually to the Board of Governors, more accessible to prospective students and other key stakeholder groups.
 - 2.C.1.d Develop and regularly report on a suite of indirect student learning outcome measures, e.g., percent of students attending professional or graduate school, percent employed in field within six months of graduation, or other indicators derived from the National Survey of Student Engagement results.
 - 2.C.1.e Publish existing Employment Security Commission employment and income data by major on publicly available web sites such as the College Foundation of North Carolina and the University of North Carolina.
- 2.C.2 In partnership with one or more nationally recognized higher education assessment organizations (e.g., Educational Testing Service) develop and fully implement a robust competency-based general education learning outcomes assessment strategy that complements current multi-method assessments of learning.
 - 2.C.2.a In the fall of 2013, pilot the use of the revised College Learning Assessment (CLA) on five UNC campuses already using or planning to use this tool. Develop protocols for administering the test to a statistically valid sample of the fall 2013 freshman cohort. ("College Learning Assessment")
 - 2.C.2.b By January 2014, receive recommendations from the General Education concerning 1) the common core competencies and value outcomes that characterize a 21st-century undergraduate education, and 2) proposed operational definitions, tools and research design for measuring the agreed-upon core competencies at the campus-level across the system. Recommendations will be informed by a thorough evaluation of the data collected from the CLA pilot program, an analysis of constraints that might limit the capacity to deliver the test to a more expanded set of students, and identification of policy or methodological changes that would be required to address recently documented shortcomings of a low-stakes testing environment.
 - 2.C.2.c By May 2014, complete an alumni satisfaction survey to determine students' perception of educational value and quality. In support of campus-based efforts, the University will provide resources and methodological and statistical expertise to ensure a robust sample and response rate. ("Alumni Survey")
 - 2.C.2.d By fall 2014, provide seed funding to campuses to support pilot projects designed to refine the proposed quantitative measures of individual student learning and develop appropriate and cost-effective test administration protocols.

- 2.C.2.e By May 2015, identify steps necessary to bring to scale a comprehensive competency-based measurement approach across all UNC campuses.
- 2.C.2.f Beginning in the 2013-14 academic year, provide resources to one or more campuses to pilot an e-portfolio approach to documenting student learning across general education and the major. E-portfolios will include learning derived from both traditional and non-traditional classroom experiences, co-curricular activities, and capstone projects or seminars. Information included in e-portfolios should help students document their ability to apply knowledge, skills, and responsibilities to complex problems and new settings in the workplace and civic life.
- 2.C.2.g By September 2015, bring to scale across the system a competency-based approach to assessing general education core learning outcomes and determine whether or not to adopt a common e-portfolio platform and framework.
- 2.C.2.h As appropriate, join national efforts (currently led by the state of Massachusetts) to develop a robust database for comparing campus learning outcomes with those of their peers.
- 2.C.3 Working with campus leadership and faculty, develop and implement a system-wide Prior Learning Assessment (PLA) program (fall 2014 – fall 2016).
- 2.C.4 Implement a robust strategy for measuring the longer-term career and responsible citizenship outcomes of UNC degree recipients.
- 2.C.4.a Conduct alumni surveys at 1-year, 5-year, 10-year, and 20-year intervals after graduation, to include information on employment and career mobility, civic wellness [e.g. participation in voting, volunteering, service work, children's education and development, and associated individual benefits (e.g. health, happiness, reduced stress)].

IMPLEMENT A COMPREHENSIVE E-LEARNING STRATEGY

- 2.D.1 Eliminate distance education tuition charges for full-time on-campus students to maximize access to online courses and reduce time to degree. Ten UNC campuses charge additional tuition and fees to full-time, on-campus students who take distance education courses in excess of the full-time tuition cap (12 hours). Funds are requested to allow students enrolled full-time in traditional campus-based degree programs to take distance education classes offered by their home institutions at no additional cost.
- 2.D.2 In collaboration with a Chancellor's Advisory Group, identify key strategic partnerships that will enhance UNC's ability to leverage its reputation for academic excellence and its current investments in UNC Online, CFNC, UNC-TV, and UNC Health Care. Based on a careful evaluation of their product quality, capacity to extend UNC's reach to new student populations, business model viability, and adaptability to a range of disciplines and institutional types, explore negotiation of an MOU with one or more providers of e-learning and MOOC platforms (e.g., Coursera, EdX). (March 2013 –December 2013)
- 2.D.3 Through a Request for Proposals (RFP) process to UNC campuses and faculty, develop and deliver up to ten new competency-based distance-delivered general education or other bottleneck courses (including laboratory courses) and five MOOC's that meet the highest standards of instructional quality and student learning and meet lower-division general education requirements at all UNC campuses. (Beginning September 2013, develop and launch two new competency- based general education courses and one MOOC per year, in each academic year of the strategic plan).

- 2.D.4 Become a national leader in the use of technology-enhanced pedagogies that measurably improve student learning outcomes, decrease course non-completion rates, and reduce hours to degree.
- 2.D.4.a Develop an RFP that provides incentives to faculty to leverage technology in the redesign of courses within the general education core that have high DWIF rates. (Annually, beginning September 2013)
- 2.D.4.b Develop an RFP that provides incentives for faculty to pilot the development of online competency-based courses. All courses funded through this process will include a plan for benchmarking student learning outcomes in the distance-delivered course vis-à-vis its on-campus equivalent. (Annually, beginning September 2013)
- 2.D.4.c Deliver faculty development that focuses on formative assessment and learning analytics in teaching and learning of general education core courses. (Begin February 2013 and ongoing)
- 2.D.4.d Institute a series of annual faculty development sessions that allow for the exchange of best practices for using technology to deliver instruction that is affordable, accessible, and scalable. (Begin February 2013 and ongoing)
- 2.D.4.e In recognition of the central role of faculty in developing and delivering quality e-learning opportunities, the President, in consultation with the UNC Faculty Assembly, will appoint a working group to develop and recommend a University-wide process for ensuring faculty have the skills required to develop and deliver high-quality online coursework before being allowed to do so. (Begin Summer 2013)
- 2.D.5 Initiate and implement primary market research on key target audiences and influencers of distance education opportunities, including high school students, community college students, part-way home students, military personnel and veterans, adults with an earned baccalaureate degrees, and school counselors (university, community college, and high school).
- 2.D.5.a Develop RFP for market research contract with a company (e.g., Noel Levitz) specializing in higher education enrollment management services to identify specific programs of greatest interest to non-traditional student populations we wish to serve to help meet our degree attainment goals. (March – July 2013)
- 2.D.5.b Award contract with a May 2014 due date for agreed-upon deliverables. (November 2013)
- 2.D.5.c Develop system-wide implementation plan based on results of market research (May 2014-August 2014). This plan will be based on existing campus strengths leveraged to foster inter-institutional collaboration.
- 2.D.5.d Through an RFP process to UNC campuses and faculty, design courses and initial degree programs responsive to results of market research. (June 2014-July 2015)
- 2.D.5.e Facilitate implementation of a portfolio of distance-delivered programs responsive to needs of adult learners, including military personnel and veterans, part-way home students, and transfer students. (August 2015 – June 2018)
- 2.D.5.f Assure the quality of all online courses and degree programs by benchmarking course completion rates and student learning outcomes against the traditionally delivered equivalent. Where possible and appropriate, results will be reported separately for low-income, part-time, and other underrepresented or underserved student populations. (Annually, beginning September 2014)

- 2.D.6 Launch UNC Online marketing campaign to drive visibility of website, degree and program offerings, and other services and resources offered online. (January 2014)
- 2.D.7 Develop and aggressively market a fully online inter-institutional undergraduate degree in liberal studies or interdisciplinary studies that is designed with flexible delivery options specifically for adults with some college, but no degree, as well as military personnel and veterans.
 - 2.D.7.a Develop and deliver initial online courses that are requirements for an inter-institutional undergraduate degree in liberal studies or interdisciplinary studies (September 2014-June 2015)
 - 2.D.7.b Through an RFP to UNC campuses and faculty, continue necessary course development and begin marketing and delivery to target populations. (August 2015-June 2017)
 - 2.D.7.c Complete and deliver all required courses for the fully online inter-institutional liberal studies or interdisciplinary studies baccalaureate degree.
- 2.D.8 Expand the number of 2+2 programs delivered via distance education.
 - 2.D.8.a Launch an aggressive marketing campaign to promote availability of existing 2+2 programs. (September 2013, and ongoing)
 - 2.D.8.b Enhance existing 2+2 online degree inventory with programs identified as high-interest/high-need by market research completed in December 2013. (Through an RFP to UNC campuses and faculty, beginning September 2014 and annually thereafter.)
- 2.D.9 Through an RFP process, pilot of a series of competency-based online post-baccalaureate certificate programs that are matched to specific economic needs within the state and based on prior market research analysis.
 - 2.D.9.a Plan and begin initial development of post-baccalaureate certificate programs identified through market research as in high-need by employers and in high demand by potential students. (January 2014 – August 2014)
 - 2.D.9.b Fully develop and launch three online competency-based post-baccalaureate programs matched to specific workforce and economic development needs. (January 2015- August 2016)
- 2.D.10 Explore avenues to expand access to the UNC Online Exchange for World Languages with new markets through new and existing partnerships, such as the Southern Regional Education Board and the U.S. military, and establish programs to enable assessment of sustainable and scalable revenue-generating models for a state, national, and international online presence that generates potential new revenue. (Beginning September 2014 and ongoing)

REDUCE ATTEMPTED HOURS TO DEGREE THROUGH MORE COMPREHENSIVE ADVISING

- 2.E.1 By fall of 2015, initiate a biennial employer satisfaction survey. [Action Item and sub-tasks related to work in "Become a National Leader in the Assessment of Student Learning Gains" section.]
 - 2.E.1.a Using the response categories excellent, good, fair, needs improvement, and poor, the survey must include the following items: written skills, oral communication skills, ability to work with others, problem-solving skills, ability to understand and use technical information, work ethic, and adaptability/flexibility.

- 2.E.1.b Institutions should consider asking employers an open-ended question about how they could better prepare future graduates.
- 2.E.1.c General Administration will work with campuses to develop an approved employer sampling procedure that will generate valid results.
- 2.E.2 Each campus will implement electronic advising support software. At a minimum, software will be used to create a comprehensive advising portfolio that documents all advising encounters, makes the record of advising available to students and advisors, and follows the student across majors in different colleges and degree programs. The technology will allow advisors to focus more exclusively on major selection and navigation of workforce options.
- 2.E.2.a To facilitate seamless transfer, explore scaling electronic advising solution to include the North Carolina Community College System.
- 2.E.2.b Hire additional professional and academic career advisors and provide staff and other resources necessary to support high-quality faculty advising.
- 2.E.2.c Implement strategies for assessing and improving student satisfaction with academic and career services.
- 2.E.2.d Through an RFP to UNC campuses and faculty, pilot a series of post-baccalaureate certificate programs that are matched to specific economic needs/employer demands within the state (based on employer surveys and prior market research analysis).
- 2.E.2.e See also Section on UNC Serves for additional action steps related to internships and university/employer partnerships.

PREPARE MORE HIGHER-QUALITY TEACHER AND SCHOOL LEADERS

- 2.F.1 Ensure that UNC campuses are individually and collectively responding to the state's need for high-quality PK-12 teachers and school leaders.
- 2.F.1.a Update statewide market research and use in teacher recruitment planning to drive each campus' enrollment growth plan implementation. (December 2013)
- 2.F.1.b Renew campus-based enrollment growth plans aimed at increasing the number of initially licensed teachers for North Carolina public schools, particularly in identified high-need licensure areas (mathematics, science, middle grades, and special education). (December 2013)
- 2.F.1.c Ensure that each campus preparing teachers has a recruitment plan that is aligned to current market research and the UNC system plan, responsive to the state's supply/demand needs, and informed by the results from UNC's teacher quality research. (May 2014)
- 2.F.1.d Assess and track campus productivity of initially licensed teachers responsive to state supply and demand: both overall productivity and productivity in identified high-need licensure areas (mathematics, science, middle grades and special education). (Fall 2013 and annually thereafter)
- 2.F.1.e Report to the Board of Governors and the NC General Assembly on campus productivity of initially licensed teachers responsive to state supply and demand. (Fall 2014)
- 2.F.1.f Recalibrate the number of initially licensed teachers and school leaders prepared by UNC campuses, individually and collectively, to more effectively meet the state's PK-12 teacher and school leadership needs. (Fall 2014)

- 2.F.2 Ensure that the quality of North Carolina PK-12 teachers and school leaders prepared by UNC schools of education is evaluated and monitored regularly.
- 2.F.2.a Continue to expand UNC's agenda of outcome-based research on teacher and school leader preparation and ensure that the research is utilized by system and campus leadership to examine program quality and facilitate evidence-based program improvements. (Annual Teacher Quality research agenda established annually in August)
- 2.F.2.b Report annually to the Board of Governors on the assessed impact(s) of teachers prepared by UNC teacher preparation programs, as evidenced by analysis conducted through UNC's teacher quality research initiative. (Teacher Portals report delivered February 2014; UNC Teacher Preparation Program Effectiveness report delivered February 2015. Two reports alternate annually thereafter.)
- 2.F.3 Seek to improve the performance of early-career teachers by adopting practices and policies intended to improve teacher preparation through more effective student teaching internships, meaningful mentoring, and comprehensive induction experiences.
- 2.F.3.a Design implementation strategy for bringing NC New Teacher Support Program to full scale. (Sept. 2013-May 2014)
- 2.F.3.b Begin implementation of fully scaled New Teacher Support Program (June 2014 – June 2015)
- 2.F.3.c Complete implementation of the fully scaled program (May 2018)
- 2.F.3.d Initiate development of a school leadership support program (September 2014 — ongoing).

3. SERVING THE PEOPLE OF NORTH CAROLINA

INVEST IN GAME-CHANGING RESEARCH AND SCHOLARSHIP THAT SOLVES PROBLEMS OF NORTH CAROLINA – AND THE WORLD

- 3.A.1 Drawing on faculty and staff from across the UNC system, form six consortia in areas of excellence and develop plans to identify opportunities, recruit and retain talent, and assess infrastructural needs.
- 3.A.2 Hire, reward, and retain critical faculty in areas of excellence.
- 3.A.2.a Hire key faculty — UNC's growth in areas of excellence will hinge on its ability to attract and retain faculty recognized nationally and globally for their excellence in our priority areas. These key researchers bring with them external funding and the ability to garner more, connections to important sources of research investment, and well as the ability to attract other talented researchers to join their labs or research areas. Over the next five years, UNC should retain, reward, and hire faculty members in priority areas to help move the needle on research.
- 3.A.2.b Reward and retain existing faculty — The University already has core expertise and experience in each of the areas of excellence identified above. Current faculty are essential to the success of the initiatives, and UNC must invest in their support and retention. UNC should establish a competitive UNC Faculty Scholars program, modeled after the similarly named program at NC State, to recognize and reward selected early- and mid-career faculty, who will receive \$10,000 annually for five years to support their academic endeavors. Additionally, UNC must be in a position to match offers from other universities that seek to recruit our best faculty members.

- 3.A.2.c Provide professional development and proposal support — Ongoing funding to support continued mentoring and professional development of faculty members increases the probability that faculty will achieve excellence. Proposal development support will allow faculty to develop successful applications for federal and industrial extramural funding.
- 3.A.3 Provide competitive start-up funding, shared equipment, and core facilities, and develop or lease laboratory and research space.
- 3.A.4 Connect campuses throughout the world.
- 3.A.5 Expand professional science master's degree programs.
- 3.A.6 Recruit highly-entrepreneurial graduate students and post docs.
- 3.A.6.a To better prepare more UNC undergraduate students for our fast-changing world, where they will need to be prepared to create or work in "jobs that don't yet exist, using technology that hasn't yet been invented in order to solve problems we don't even know are problems yet," (7) UNC should create a focused, time-limited competitive fund to encourage campuses to develop new undergraduate entrepreneurship initiatives for non-business majors, with a particular focus on start-up companies.
- 3.A.6.b UNC should support 60 President's Graduate Fellows, graduate students identified through their applications as "highly entrepreneurial," who would receive two years of support to attend UNC campuses and pursue their interests.
- 3.A.6.c UNC should provide support each year for ten President's Postdoctoral Fellows, who would receive one year of support to further develop promising ideas or technologies. These steps will help us both recruit and retain top students and help them begin the process of turning ideas into reality (see Section 1F for more detail).
- 3.A.7 Grow the number of superstar STEM students
- 3.A.8 Support Defense Applications Group (new Action Item created for reporting/tracking purposes)

CONVERT DISCOVERY INTO INNOVATION

- 3.B.1 Establish Collaboration Seed Fund.
- 3.B.2 Develop new Innovation Discovery Teams.
- 3.B.3 Move forward promising early-stage ideas through proof-of-concept fund.
- 3.B.4 Advance ideas ready for commercialization through investment.
- 3.B.5 Increase effectiveness of REACH-NC as a portal to our campuses.

SERVE THE NEEDS OF OUR STATE. REGIONS AND COMMUNITIES THROUGH ACTIVE ENGAGEMENT

- 3.C.1 Develop Annual Engagement Report.
- 3.C.2 Prepare "job-ready" students through experiential internships.
- 3.C.3 Encourage development of innovative continuing education and post-baccalaureate programs.
- 3.C.4 Support UNC research and scholarship on culture, tourism, and the creative economy.
- 3.C.5 Create new center for applied public policy.
- 3.C.6 Review UNC Center for Public Television.

HELP MEET THE GROWING HEALTHCARE NEEDS OF THE STATE THROUGH INNOVATIVE RESEARCH, TRAINING AND OUTREACH

- 3.D.1 Establish a Health Care Redesign Task Force.
- 3.D.2 Expand AHEC to support community-based training of physicians, dentists, and other health professionals.
 - 3.D.2.a New residencies — This plan calls for funding 40 new physician residencies at the level of \$100,000 per position, with the remaining cost required as a match by the teaching hospital. This recommendation was included in the 2008 UNC Plan for Medical Education approved by the UNC Board of Governors. AHEC conducted extensive research on its past experience and demonstrated that students trained in local communities are the most likely to remain in practice in the state, often in the same community where they were trained. In 2011, 63% of AHEC physician residents remained in North Carolina to practice medicine. The average economic impact of one family physician is \$904,696.
 - 3.D.2.b Additional community-based training — The plan recommends making additional funding available for AHEC to expand its community education opportunities. AHECs will work in partnership with community institutions such as community health centers, hospitals, health departments, and other agencies to develop innovative community-based training sites. In these community and rural teaching sites, students will be exposed to high-quality health care delivery and to preceptors and mentors who are prepared and motivated to teach.
 - 3.D.2.c Dental housing — AHEC made a commitment to house students from the new School of Dental Medicine at ECU during fourth-year rotations at community learning centers across the state, beginning in 2014. AHEC already provides housing in some 50 sites around the state, but does not have housing available in the sites where the ECU learning centers will be located. Initial sites include Ahoskie, Elizabeth City, and Sylva, but there will be a total of ten centers by 2014. AHEC will add a housing unit for 4-6 students at each of these ten sites across the state. This investment will also add housing capacity for additional students from UNC campuses and other schools while they participate in off-campus clinical training across North Carolina.
 - 3.D.2.d Center for Rural Health Innovations — There is a critical need to better understand and address persistent health disparities in rural North Carolina. AHEC will create the Center for Rural Health Innovations at ECSU to prepare students to work in a broad array of health fields in rural North Carolina, providing inter-professional, community-based teaching sites for students.
- 3.D.3 Provide education and training for the next generation of pharmacists.
 - 3.D.3.a Expand the clinical preceptor base to support early student immersion in the patient care environment and increase the time devoted to immersion in patient care.
 - 3.D.3.b Add 20 new pharmacy residency positions to increase the workforce contributing to the delivery of direct patient care services.
 - 3.D.3.c Recruit leadership and expand core teaching faculty and teaching assistants to support curricular transformation efforts and expand the number of faculty specifically devoted to the School's educational mission. Recruit a tenure-track faculty member to lead the planned Center of Excellence in Pharmacy Practice (CEPP).
- 3.D.4 Develop doctor of nursing practice (DNP) programs in UNC.

4. MAXIMIZING EFFICIENCIES

MISSION REVIEW AND REFINEMENT

- 4.A.1 Complete a review of all campus mission statements and bring any proposed changes to the Board of Governors for consideration and approval. The President will establish guidelines and a timeline for this review.

OPERATIONAL AND ADMINISTRATIVE SAVINGS

- 4.B.1 Evaluate maintaining or implementing shared services in the following areas:
 - 4.B.1.a Residency Determination – Under the current system, applicants to UNC- campuses are evaluated for North Carolina residency status by staff located on each campus. If an applicant applies to more than one UNC institution, his or her residency determination is made by each individual institution. Because many students apply to more than one UNC institution, more than 25% of all residency reviews performed across the system are duplicative. Among these duplicative reviews, 6% yield inconsistent determinations, creating justifiable confusion for the applicants and often leading to administrative appeals that are time-consuming for prospective students and for campuses. A single, system-wide evaluation of residency status would not only eliminate redundant reviews, but also ensure consistent results for students who apply to more than one UNC campus.
 - 4.B.1.b Internal Audit – Currently, each UNC institution operates its own internal audit unit. The fragmentation of these units impedes the spread of best business practices among campuses and prevents the University from realizing economies of scale in audit reviews. A shared auditing service has the potential to reduce audit expenditures across the system and allow smaller campuses to access specialist skill sets and expertise that might otherwise be unavailable.
 - 4.B.1.c Financial Aid Information Review – Federal regulations require schools to check the accuracy of the information submitted to the Free Application for Federal Student Aid (FAFSA). The verification process must be completed before financial aid can be awarded or disbursed. This task is performed for every new applicant who seeks financial aid, and it is repeated annually for all students re-applying for financial assistance. Since some students apply to more than one UNC campus, there are duplicative verification reviews conducted by multiple campuses. Establishing a shared service center to verify student-submitted family financial information could create economies of scale, particularly benefitting smaller institutions and avoiding multiple reviews of information provided by the same student.
 - 4.B.1.d Information Technology Infrastructure – Continue hosted services that allow smaller institutions access to specialist skill sets and provide the technical redundancy necessary for data backup and disaster recovery plans.
- 4.B.2 Strategic sourcing – The University can extend savings and considerably strengthen its buying power by purchasing common commodities in cooperation with state government. Eight commodities, including laboratory supplies, basic maintenance items, copier paper, mattresses, audio/visual equipment, print services, bulk scanning, and personal computers are being purchased through state government as of FY 2012-13. Office supplies will be added to the strategic sourcing initiative in early FY 2013-14.

- 4.B.3 Non-instructional personnel costs – The University conducts ongoing span-of-control evaluations to reduce excess layers of management. The UNC General Administration and Office of State Budget and Management project team benchmarked staffing ratios of IT, human resources, budget and finance, and educational administrator personnel across the system. All benchmarks also evaluate UNC institutions against external organizations of similar size. The current analysis does not compare organizational performance (as measured by outputs or outcomes), and therefore does not assess whether a given staffing group performs more efficiently than another. Going forward, General Administration will work with the campuses to evaluate this information more closely to determine whether efficiencies may be implemented.
- 4.B.4 Improve business practices and eliminate redundant processes — Through regular benchmarking reviews, the University will continue to consolidate administrative and student-support functions. Launched in 2008, the UNC FIT initiative provides tools that enable the President and chancellors to monitor financial processes and detect and fix potential fiscal problems early, rather than relying on audits to reveal them after the fact. Savings and value-added efficiencies to be implemented in the future include expanding standardization practices in student accounts and capital assets; ensuring greater alignment and compliance with the state’s Internal Control Act; and improving University-specific control environments through the development of more comprehensive self-assessments.
- 4.B.5 Secure energy savings – All campuses are actively pursuing the 30% reduction in energy and water usage mandated by the General Assembly in 2007. Currently, 14 campuses, along with UNC General Administration and UNC-TV, have energy performance contracts in place totaling \$188 million, with a projected annual savings of just over \$11 million. In the future, expanding UNC’s ability to manage energy projects (where there is sufficient capacity) and to develop new public/private partnerships will allow the system to reap additional utility savings.

ACTIVE PORTFOLIO MANAGEMENT

- 4.C.1 In consultation with campus leadership, adopt system-wide guidelines for instructional productivity in each program.
- 4.C.2 In partnership with campus administrators and faculty, develop a framework of student learning outcomes, especially within general education requirements, that is designed to improve transferability of credits between and among UNC campuses and North Carolina community colleges and to minimize the disruptive impact on time to degree when students opt to change academic majors.
- 4.C.3 Defragment select program islands and satellites through consolidation.
- 4.C.4 Pursue broader and more fundamental uses of online instruction.

INCENTIVIZE SAVINGS PRACTICES

- 4.D.1 Amend carry-forward statutes to create a Savings Incentive Program.

ENHANCED DATA ANALYTICS

- 4.E.1 Create the Student Data Mart.

- 4.E.1.a Provide the foundation for a business intelligence (BI) tool with dashboard for simple and immediate access by General Administration and campus leaders. Examples of data categories that would be included in a BI tool are student admissions, enrollments, freshmen academic profile, degrees awarded, and student success (e.g. graduation and retention rates).
- 4.E.1.b Streamline the production of official files used in state and federal reporting.
- 4.E.1.c Create a common, scalable foundation that other data exchange projects (e.g., electronic transcripts, Statewide Longitudinal Data Set) can leverage.
- 4.E.2 Implement UNC Wilmington's Predictive Analytics Project across other UNC campuses.
- 4.E.2.a Cost Allocation Analytics – This tool tracks expenditures, revenues, student credit hours, and other pertinent information at the division, department, and program levels, allowing for more detailed evaluation of organizational efficiency and effectiveness.
- 4.E.2.b Enrollment Management Analytics – The system organizes student applicants by various characteristics, demographics, and other variables to predict likely outcomes of success under different scenarios. This resource will allow for improved student outcomes and an enhanced effort to meet targets for diversity and quality.
- 4.E.2.c Business Analytics – The system provides a resource to monitor and manage budget/cash position, identify patterns and anomalies in data, conduct deep trend analyses using statistical and financial management, and produce accurate and timely regulatory reports for planning and budgeting.

PROGRAM MONITORING, EVALUATION AND IMPLEMENTATION

- 4.F.1 Expand the capacity of UNC FIT.
- 4.F.1.a Develop and implement shared service centers for internal audit, financial aid, and student residency verification;
- 4.F.1.b Create a joint UNC and state government strategic sourcing function; and
- 4.F.1.c Establish a North Carolina education transcript exchange service whereby the state's public schools, community colleges, and universities can electronically share student transcript data to meet degree attainment requirements. [Action Item associated "Enhanced Data Analytics"]
- 4.F.2 Bolster the Office of Institutional Research.

5. ENSURING AN ACCESSIBLE AND FINANCIALLY STABLE UNIVERSITY

HONOR NORTH CAROLINA'S CONSTITUTIONAL MANDATE OF LOW TUITION AND FEES

- 5.A.1 The current tuition and fees plan is effective through fiscal year 2014-15. The President, in consultation with the chancellors of the constituent institutions, should develop a revised tuition and fee plan to be presented to the Board of Governors for consideration by November 2013. A major goal of the proposed new plan is to reduce the current 6.5% cap.

SUSTAIN THE COLLEGE FOUNDATION OF NORTH CAROLINA

- 5.B.1 An appropriation of \$1.0 million in year one, \$2.5 million in year two and \$5.0 million in years three and beyond would help maintain CFNC's services and value to North Carolina students and families. This investment would sustain CFNC through a 50%-50% division between state appropriations and federal support.

ENHANCE PRIVATE FUNDRAISING

- 5.C.1 Develop top-quality, centralized shared staffing.
- 5.C.2 Augment campus-based major gifts staffing.

ADDRESS REPAIR AND RENOVATION NEEDS

- 5.D.1 Create a consistent and sustainable funding stream to better manage the state's capital assets. Specifically, establish an annual revolving borrowing capacity evenly divided between the UNC system and other state agencies.

ACTION ITEM CONSOLIDATION

The Actions Items outlined below have been consolidated in the dashboard reports. Items highlighted in yellow reflect modifications to the consolidation since the Strategic Planning Committee meeting in October.

- Combined 1.C.2 into 1.C.1.
- Combined 1.D.1 into 2.B.1
- Combined 2.A.3 into 2.A.1
- Combined 2.B.3 into 2.B.2
- Combined 2.B.7 into 2.B.6
- Removed 2.C.1, 2.C.2, and 2.C.4, as they are headings
- Combined 2.C.2.d into 2.C.2.a
- Combined 2.C.2.c into 2.C.4.a
- Decoupled 2.D.2 and 2.D.3
- Combined 2.D.4 into its sub Action Items
- Combined 2.D.4.d into 2.D.4.c
- Combined 2.D.5.a, 2.D.5.b and 2.D.5.c into 2.D.5
- Combined 2.D.7a, 2.D.7b, 2.D.7c into 2.D.7
- Removed 2.E.2.e, as it is a descriptive note and does not contain a work plan
- Combined 2.E.1.a-2.E.2.c into 2.E.1
- Combined 2.F.1, 2.F.1.b, 2.F.1.c, 2.F.1.d, 2.F.1.e, and 2.F.1.f into 2.F.1.a
- Combined 2.F.2a and 2.F.2b into 2.F.2
- Combined 4.C.2 into 2.B.4
- Combined 4.E.1.a, 4.E.1.b, 4.E.1.c, 4.F.1.c and 1.D.2 into 4.E.1 (Student Data Mart)
- Combined 4.F.1.a and 4.F.1.b into 4.B.1.c