

This document contains REPORTS from the three Strategic Directions Workgroups that involve FA-appointed members:

- General Education Council
- Efficiencies Workgroup
- E-Learning Workgroup

General Education Council Update

August 1, 2013

The General Education Council (GEC) had two meetings during the Spring 2013 semester. The first was a short meeting on April 10th to introduce members to each other and to receive our charge from Senior Vice President for Academic Affairs, Suzanne Ortega. The GEC met for a second time at UNC on April 23rd to hear a presentation from the Educational Testing Services (ETS) regarding their work in evidence-centered assessment and the potential for collaboration. This was intended to be the first of several possible meetings with experts the GEC is to engage as part of its work in identifying core competencies in general education, associated learning outcomes, and measures and tools for assessing student learning in with respect to these outcomes.

Based upon submitted preferences and the desire to balance faculty and administrators across the five subcommittees (Core Competencies, Engaging Experts/Quantitative Assessment, College Learning Assessment (CLA) Pilot, Qualitative Analysis, and Communications), the co-chairs (Joan Lorden and Erin McNelis) in consultation with Suzanne Ortega determined subcommittee memberships. Chairs for each subcommittee were determined in much the same way:

- Core-Competencies Subcommittee Chair: Brenda Allen, WSSU, Provost
- Engaging Experts/Quantitative Assessment Chair: Purification Martinez, ECU, Associate Professor of Foreign Spanish (with Joan Lorden, UNCC, Provost, as co-chair in Summer 2013)
- CLA Pilot Subcommittee: John Brooks, FSU, Dean of the University College
- Qualitative Analysis Chair: Mike Wakeford, UNCSA, Social Sciences
- Communication Chair: Paulette Marty, ASU, Director of General Education

In May 2013, the co-chairs Lorden and McNelis created a draft of the proposed charges and timelines for each of these subcommittees. After a few revisions, the charges were approved in June by Suzanne Ortega and shared with the council. Following a conference call with four of the five subcommittee chairs (Purification Martinez is out of the country this summer and has unfortunately not been in touch with council chairs since May 2013) on June 14th, the individual subcommittees have been working on their charges independently.

The GEC met in Chapel Hill on July 31 for a day-long meeting, with subcommittees meeting in the morning session and the council meeting as a whole in the afternoon. Key items to report are as follows:

1. **Core Competencies:** The Core Competencies Subcommittee has spent time refining definitions of what we're looking for (competencies, outcomes, goals, etc.), reading related literature and studies, compiling a comprehensive list of learning outcomes across the system, and discussing the purpose of general education as related to the councils work. In particular, the subcommittee sees general education as the means of creating opportunities for students to gain the skills and competencies we are articulating, skills that should be reinforced through work within their disciplines. Based on the initial analysis, the subcommittee believes there is an emergent core of competencies in our general education programs and goals:
 - a. Communication or thoughtful expression (oral and written)
 - b. Critical inquiry
 - c. Critical reading (or perhaps information literacy)
 - d. Creative thinking
 - e. Global understanding and awareness

The subcommittee is still revising these definitions and descriptions and intends to send a clear communication to the campuses in August explaining their work. They will ask for feedback and suggestions regarding their initial core competencies from faculty across the system through the Faculty Assembly website (via a survey or similar tool) by September 10th.

Based on group discussion in the afternoon GEC meeting, the Core Competencies Subcommittee is considering shrinking this list of core competencies down further. It is recommended that they write an introductory statement regarding the skills expected of a 21st century education, that there are many qualities/competencies (referencing these greater lists), but indicating we are choosing to focus on a very small set of these competencies to be required university-wide. It was also recommended that the chosen core be competencies that best lend itself to consistent and relatively easy assessment across the university system, regardless of general education program implementation and mission. Additional issues stressed by the subcommittee are the choice to stay away from specifying any disciplines in core competencies, the desire to develop a common set of best practices in teaching and assessment, and the intent to work on value rubrics.

2. **CLA Pilot:** Five campuses (ASU, FSU, ECU, WCU, and UNCP) will be piloting the new CLA Plus test on their campuses in the 2013-2014 academic year. In collaboration with representatives from each of these institutions and Kate Henz, this subcommittee agreed that the test should be given to a set of freshmen in the fall semester and seniors in the spring semester (originally, the pilot only included testing freshmen in the fall, but the institutions indicated that this value-added assessment is not helpful without also testing the senior class ... this change was approved by President Ross in May). The sample size was determined to be 200 freshmen and 200 seniors at each institution. According to the CLA representatives, to have valid results on the unit you are studying, you must have either 100 individuals or 50% of the individuals in the unit take the test. The default unit of measurement for the CLA test is the "institution" (i.e. results are used to draw conclusions about student learning at the institution level). Because the hope was to gain more information with regards to performance based on college, program, or demographics, the sample size was set to be 200.

Rather than specify procedural protocols to be implemented across the institutions, the pilot campuses have been asked to carry out the sampling and test implementation in their preferred manner and to report these methods and results back to the subcommittee. Key issues regarding implementation of a standardized assessment the subcommittee will look this fall and spring include sampling strategies and representativeness of the sample, student turn-out (though students are selected to participate, getting them to actually take the test is harder, particularly for seniors), incentives, and scalability to a university-wide level. The subcommittee also recognizes that in addition to identifying a means of quantitative assessment that meets our needs, we must find a standardized assessment that will provide useful feedback to student, faculty and programs. Without faculty support, any standardized test would be seen as a UNC mandate and would not be embraced.

3. **Qualitative Assessment/Engaging Experts:** These groups have started talking about e- and digital portfolios and different platforms available or used in the system. Committee members will be assigned campuses to contact about these tools as well as any other means of qualitative assessment they use (such as capstone projects or courses). We're separating the task of identifying assessment goals from tool selection; the time for tool selection will come, but it's likely no one tool will meet each programs needs and we want to respect institution autonomy. The subcommittee is developing a list of "experts" we'd like to invite to speak to us (perhaps on an "expert day" for the entire council), including the Lumina Foundation, AAC&U, Clemson University, Education Advisory Board, etc. At the July 31st meeting, Suzanne mentioned the possibility of asking President Ross for funding (\$50K - \$100K) for an e-portfolio pilot in the 2013-2014 academic year, as specified in the Strategic Directions action steps for becoming a national leader in assessment. The subcommittee members were in favor of pursuing this request and will be submitting a brief proposal to Suzanne in the next week requesting funding to pilot use of an e-portfolio on a few campuses (focusing on smaller populations such as the freshmen at UNCSA or a College of Arts & Sciences at a larger institution) to assess a single core competency. If approved, the subcommittee will develop a request for proposals (RFP) in August to share with the campuses.

4. **Communications:** The Communications subcommittee is focusing on three levels of communication:
- a. Communication within the council, predominantly through use of ActiveCollab.
 - b. Communication with the CAO's, Faculty Assembly, and General Assembly, keeping them up-to-date on the work of the council and subcommittees through a monthly update at the beginning of each month.
 - c. Communication with the campuses:
 - i. In August, a communication with an overview of our work, progress thus far, and our timeline will be sent from GEC co-chairs.
 - ii. Each subcommittee is to determine when they will need to communicate with the set of campuses, including when and what types of surveys will be needed.
 - iii. The subcommittee intends to use the Faculty Assembly site to host surveys or tools for gathering feedback from the campuses, perhaps also hosting materials to be shared with all of the campuses.

The subcommittee will rely on members of the GEC as well as members of the Faculty Advisory Council – Strategic Directions Implementation (FAC-SDI) to make sure that the appropriate individual/groups are getting information out to their campuses.

Key Dates on the General Education Council Timeline:

(based on Strategic Directions Action Steps and GEC imposed interim deadlines)

Deliverable/Milestone	Planned Completion Date
1. Identify at least one campus to pilot e-portfolio.	April 2013 September 2013?
2. Develop test protocols for administering CLA Plus	August 2013
3. Send communication to all campuses on GEC work and timeline	August 2013
4. Send out Request for Proposals for e-portfolio Pilot	August 2013
5. Send communication and request feedback from system on core competencies.	September 10, 2013
6. Pilot CLA Plus to Freshmen	Fall 2013
7. Preliminary recommendations on core competencies and value outcomes	October 15, 2013
8. Develop initial vocabulary and glossary of key definitions	Mid-November 2013
9. Bring recommendations to Faculty Senates and Faculty Assembly seeking endorsement before delivering to President Ross.	December 2013
10. Recommend list of core competencies and value outcomes.	January 2014
11. Analysis of CLA data (administrative constraints, policies addressing shortcomings)	January 2014
12. Develop operational definitions, tools, and research design	January 2014
13. Provide initial recommendations for quantitative and qualitative measures of student learning outcomes for the core competencies	January 2014
14. Pilot CLA Plus to Seniors	Spring 2014

15. Pilot e-portfolio approach to document student learning across general education and the major	Spring 2014
16. Propose tools and methodologies to measure core competencies.	May 2014
17. Pilot quantitative methods and develop test administrative protocols for use by the entire UNC system.	Fall 2014
18. Identify steps to scale project	May 2015
19. Bring to scale project	September 2015
20. Determine whether to adopt common e-portfolio platform & framework	September 2015

How the Faculty Assembly could assist the General Education Council in its mission:

Subcommittees and the General Education Council were asked to consider how the Faculty Assembly could assist with our council's efforts. Particular suggestions included:

- Host a space on the Faculty Assembly web site for the Communications Subcommittee to make available surveys, feedback tools, and materials to be shared across the campuses;
- Have FA delegates and Faculty Senate Chairs help make sure that communications from the GEC are shared (perhaps repeatedly if needed) with their campus from the most appropriate and trusted individual or group on the campus – FAC-SDI representatives and GEC members will also assist with this;
- Ask the Faculty Assembly to reserve space in their December 2013 agenda and meeting for discussion of proposed core competencies, student learning outcomes, and assessment methods and consider passing a resolution in support of these GEC recommendations;
- Potentially ask Faculty Assembly Delegates for help in identifying the experts in assessment and design of assessment tools (quantitative and qualitative) on their campus.
- Perhaps formation of a discussion group on standardized assessments (such as the CLA) and faculty concerns about these tools that can be addressed by the Assessment Subcommittees of the GEC in their work.

Respectfully submitted,

Erin McNelis

Co-chair of the General Education Council

August 1, 2013

Core Competencies Subcommittee

Membership: Brenda Allen (WSSU) -- Chair, Cara Cilano (UNCW), Richard Gay (UNCP), Bob Gotwals (NCSSM), Joan Lorden (UNCC), Purification Martinez (ECU), Paulette Marty (ASU), Andrew Morehead (ECU), Valerie Pruvost (UNC-CH), Catherine Rigsby (ECU/FA), Shawn Sendlinger (NCCU), Dipendra Sengupta (ECSU), Lisa Tolbert (UNCG)

Focus: *As specified in “Our Time, Our Future: The UNC Compact with North Carolina”, President Ross has appointed a General Education 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.” The Core Competencies subcommittee of the General Education Council is to focus on studying the current architecture of General Education Programs in the UNC System and identifying commonalities across these programs. Based on this analysis, the subcommittee is to recommend a common list of core competencies and corresponding learning outcomes for General Education to be used by all campuses of the UNC System.*

Timeline: As this subcommittee’s recommendations are critical to successful and timely completion of many charges to the General Education Council (recommend common core competencies and student learning outcomes by January 2014; recommend tools and methodologies, particularly quantitative, to measure outcomes by May 2014; and pilot projects to refine the proposed quantitative measures of student learning and develop appropriate and cost-effective test administration protocols in Fall 2014), drafts of all recommendations are to be delivered to the Council by October 15, 2013.

Charge:

In order to support the work of the General Education Council as specified in “Our Time, Our Future: The UNC Compact with North Carolina, Strategic Directions for 2013 – 2018” the Core Competencies Subcommittee is to

1) Use previous reports¹ on General Education as well as information from each campus Provost’s Office to identify:

a) the current general structure/architecture of General Education programs in the UNC system, including:

- i) the number of hours in the program;
- ii) the ratio of lower level courses to upper level courses; and
- iii) the overlap in foundational coursework versus discipline specific coursework.

b) the mission/purpose of the General Education programs and how campuses are currently measuring their learning outcomes; and

¹ “Our University, Our Future: A Faculty Vision for UNC Strategic Directions” with associated spreadsheet of General Education Competencies; “UNC Institutions’ General Education Competencies” compiled by the Office of General Education at Appalachian State University; and ????

c) the student learning outcomes shared across all sixteen degree-granting institutions.

2) Make recommendations for (five or fewer) common core competencies and associated measurable learning outcomes to be shared by all General Education Programs of the UNC System (preliminary recommendations should be shared with the General Education Council by October 15, 2013 for further discussion); in accordance with the Strategic Directions document, the subcommittee should 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 institutions 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;

3) Develop vocabulary and compile a glossary of key definitions and terms related to the work of the General Education Council by mid-November 2013. This glossary will help guide future work as well as make clear to the University and community the appropriate use of the Council's recommendations. The glossary should be able to elucidate answers to questions similar to the following:

- a) What is a "competency" and what do we mean by "core competency assessment"?
- b) What is a "student learning outcome (SLO)" or "value outcome"?
- c) What do we mean by "critical thinking" and where is the flexibility in terms of interpretation of this skill?
- d) What is the difference between "qualitative" and "quantitative" assessment, and "formative" and "summative" assessment?

and

4) Make recommendations regarding how and where flexibility could be built-in to allow for the differentiation of mission among the sixteen universities (preliminary recommendations should be shared with the General Education Council by October 15, 2013 for further discussion).

Engaging Experts/Quantitative Assessment Subcommittee

Membership: Stephanie Dance Barnes (WSSU), Austin Bunch (ECU), Kim Harris (UNCC), Joan Lorden (UNCC), Purification Martinez (ECU) -- Chair, Andrew Morehead (ECU), Mike Mullen (NCSU), Abigail Panter (UNC-CH), Catherine Rigsby (ECU/FA)

Focus: *The role of the Engaging Experts subcommittee of the General Education Council is to recommend to the Council appropriate quantitative measures for the assessment of the core competencies and learning outcomes to be shared by all campuses of the UNC System. Recommendations from this subcommittee, together with the recommendations from the Qualitative Assessment subgroup, will form the proposed operational definitions, tools, and research design for measuring the agreed-upon competencies at the campus-level across the system. Recommendations are to be informed by data collected from the CLA pilot program in Fall 2013 and analyzed by the CLA Subcommittee. This subgroup will also assess possible partnerships with one or more nationally recognized higher education assessment organizations to develop and fully implement a robust competency-based general education learning outcomes assessment strategy that complements current multi-method assessments of learning. The following shared excerpt from "Our Time, Our Future" should serve as a guiding principle for this subcommittee's work: "Appropriate assessment processes must not be limited to any one measure that attempts to capture all of the complexity of the desired competencies. Useful assessment – assessment that results in a full picture of what is working (and not working) to prepare college students for their careers and lives – uses multiple methodologies, includes longitudinal studies of student performance, is formative in nature, is coupled with a continuous cycle of improvement designed to maximize the success of our students, and must 'embody creativity, adaptability, reliability, and validity.'(AAHE Principles of Good Practice)"*

Timeline: The General Education Council is to make recommendations by May 2014 on tools and methodologies, to measure student learning outcomes. The Council must also be prepared to launch pilot projects to refine the proposed quantitative measures of student learning and to develop appropriate and cost-effective test administration protocols in Fall 2014. Therefore this subcommittee should provide its initial recommendations for quantitative measures of student learning outcomes for the core competencies by January 31, 2014.

Charge:

In order to support the work of the General Education Council as specified in "Our Time, Our Future: The UNC Compact with North Carolina, Strategic Directions for 2013 – 2018" the Engaging Experts Subcommittee is to

- 1) Identify internal (UNC System) experts on assessment for consultation and advising;
- 2) Determine current assessment strategies and practices in the system:
 - a) in terms of assessing General Education programs,
 - b) in terms of competency-based assessment, most likely in discipline-specific programs, and
 - c) in terms commercial and internal testing products;
- 3) Identify principles and characteristics of effective measures of assessment of General Education core competencies;

4) Identify higher education assessment organizations, the products they currently offer, and their interest and willingness to collaborate in developing assessment framework, methodologies, and instruments based upon the aforementioned principles, characteristics, and recommended measures.

5) Make recommendations on quantitative measures for each of the student learning outcomes associated with the General Education core competencies and identify how and where flexibility can be built-in to allow for the mission related differences among the sixteen universities (preliminary recommendations should be shared with the General Education Council by the end of January 2014 for further discussion).

College Learning Assessment (CLA) Subcommittee

Membership: Kim Brown (UNCA), John Brooks (FSU) -- Chair, Hans Kellner (NCSU), Erin McNelis (WCU), Catherine Rigsby (ECU/FA), Rachel Smith (UNCP)

Focus: *As indicated in the "Our Time, Our Future" Strategic Directions document, in the fall of 2013, five UNC campuses (Appalachian State University, Fayetteville State University, East Carolina University, Western Carolina University, and UNC Pembroke) will pilot the use of the revised College Learning Assessment (CLA). The CLA subcommittee of the General Education Council is to focus on assisting these universities in developing protocols for administering the test to a statistically valid sample of the fall 2013 freshman cohort and a spring 2014 senior cohort as well as to review and analyze these pilots after they have been completed. In order to assess the potential of the CLA for use as a system-wide test of General Education core competencies, the CLA subcommittee is to report on the experiences of the pilot campuses in implementing the CLA. The CLA subcommittee of the General Education Council is to focus on assisting these universities in developing protocols for administering the test to a statistically valid sample of the fall 2013 freshman cohort and a spring 2014 senior cohort as well as to review and analyze these pilots after they have been completed. The CLA subcommittee is to work closely to the Engaging Experts and Quantitative Analysis subcommittees as recommendations for means of assessment of common General Education core competencies 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.*

Timeline: In order to inform the work of the Quantitative Measures Subcommittee, the CLA Subcommittee should prepare a draft report covering the elements of the charge detailed below and based on a freshman cohort by January 31, 2014. A revised report that includes an analysis of a senior cohort and containing the subcommittee's final recommendations should be delivered to the General Education Council by November 15, 2014.

Charge:

In order to support the work of the General Education Council as specified in "Our Time, Our Future: The UNC Compact with North Carolina, Strategic Directions for 2013 – 2018" the CLA Subcommittee is to

- 1) Work with the CLA Pilot campuses on developing protocols for administering the CLA to statistically valid samples in the fall 2013 (freshman cohort) and spring 2014 (senior cohort);
- 2) Develop a report on the experiences of the pilot campuses administering the CLA. This report should address:
 - a) what the CLA measures and how this relates to the core competencies of General Education programs across the UNC system;
 - b) strategies for and challenges of administering the CLA;
 - c) resource needs, including equipment, space, and staff resources for administration;

d) use of incentives or other methods to ensure student participation and motivation; and

e) the adequacy of cross-sectional measures or the need for longitudinal measures to appropriately assess General Education competencies .

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Qualitative Assessment Subcommittee

Membership: Patrick Bahls (UNCA), Marie Hoepfl (ASU), Jennifer Horan (UNCW), Erin McNelis (WCU) , Catherine Rigsby (ECU/FA), Scott Simkins (NCA&T), Mike Wakeford (UNCSA)-- Chair

Focus: *The Qualitative Assessment subcommittee of the General Education Council is to focus on making suggestions on appropriate qualitative measures for the assessment of the common General Education core competencies as well as analyze electronic portfolio options for documenting student learning across General Education and the major. Recommendations from this subcommittee, together with the recommendations from the Engaging Experts subcommittee, will form the proposed operational definitions, tools, and research design for measuring the agreed-upon competencies at the campus-level across the system. Recommendations are to be informed by data collected from the CLA pilot program in Fall 2013 and analyzed by the CLA Subcommittee. Based upon their research, the subcommittee will also make recommendations to the committee regarding whether to adopt a common e-portfolio platform and framework for the UNC System. The following shared excerpt from "Our Time, Our Future" and "Our University, Our Future" should serve as a guiding principle for this subcommittees work: "Appropriate assessment processes must not be limited to any one measure that attempts to capture all of the complexity of the desired competencies. Useful assessment – assessment that results in a full picture of what is working (and not working) to prepare college students for their careers and lives – uses multiple methodologies, includes longitudinal studies of student performance, is formative in nature, is coupled with a continuous cycle of improvement designed to maximize the success of our students, and must 'embody creativity, adaptability, reliability, and validity.'(AAHE Principles of Good Practice)"*

Timeline: As the General Education Council is to make recommendations on tools and methodologies to measure student learning outcomes by May 2014, this subcommittee should provide its initial recommendations for qualitative assessment measures of student learning outcomes for the core competencies by January 31, 2014.

Charge:

In order to support the work of the General Education Council as specified in "Our Time, Our Future: The UNC Compact with North Carolina, Strategic Directions for 2013 – 2018" the Qualitative Assessment Subcommittee is to

- 1) Examine the e-portfolio software currently in use in the UNC system, as well as other cost effective approaches to qualitative data collection and assess the successes and challenges in implementation of e-portfolios in use;
- 2) Describe essential expectations for collection and assessment of qualitative data as a system-wide tool for assessment of core competencies of General Education and assess the feasibility of adopting a single platform for system-wide use;
- 2) Collect and assess information on needs for data security, storage, retention, and portability;
- 3) Assess whether longitudinal collection of artifacts would be needed for an adequate assessment and
- 4) Based on its findings in 1-3 above and other information the Subcommittee deems relevant, recommend for the General Education Council's consideration qualitative measures for each of the student learning outcomes associated with the General Education core competencies, where appropriate, and identify how and where

flexibility can be built-in to allow for mission related differences in General Education among the sixteen universities.

Communications Subcommittee

Membership: Kim Brown (UNCA), Austin Bunch (ECU), Richard Gay (UNCP), Bob Gotwals (NCSSM), Marie Hoepfl (ASU), Paulette Marty (ASU) -- Chair, Catherine Rigsby (ECU/FA)

Focus: *The Communications subcommittee of the General Education Council is to facilitate communication between subcommittees and develop and implement strategies for communication with the UNC System. In addition, the Communication subcommittee is to create a strategy to ensure faculty are engaged and have an opportunity to provide feedback throughout this process.*

Charge:

In order to support the work of the General Education Council as specified in "Our Time, Our Future: The UNC Compact with North Carolina, Strategic Directions for 2013 – 2018" the Communications Subcommittee is to

- 1) Provide updates on the progress of the subcommittees to each other by sharing documents developed and summarizing ongoing work through the ActivCollab site.
- 2) Develop materials for distribution to campus leadership, the Faculty Assembly, and UNC General Administration to keep campuses and the system office informed about progress toward completion of the Council's charge.
- 3) Develop mechanisms for providing feedback to the Council from the campuses.

Campus	Name	Discipline
ASU	Marie Hoepfl	Professor of Technology
ASU	**Paulette Marty	Professor of English; Director of General Education
ASU	Liz Rose	Professor of Music
ECSU	Dipendra Sengupta	Professor, Department of Mathematics and Computer Sciences
ECU	**Purification Martinez	Associate Professor of Foreign Spanish
ECU	Austin Bunch	Senior Associate Provost
ECU	**Andrew Morehead	Associate Professor of Chemistry
ECU	**Catherine Rigsby	Professor of Sedimentology
FSU	John Brooks	Associate Professor of History and Dean of the University College
NCA&T	Scott Simkins	Director, Academy for Teaching and Learning
NCCU	Shawn Sendlinger	Associate Professor of Chemistry
NCSSM	Bob Gotwals	Instructor of Chemistry
NCSU	Hans Kellner	Professor of English
NCSU	Mike Mullen	VC and Dean for Academic and Student Affairs, Professor of Soil Science
UNCA	Patrick Bahls	Associate Professor of Mathematics/Honors College
UNCA	Kim Brown	Assistant Professor of Education
UNCC	Kim Harris	Associate Professor of Mathematics
UNCC	Joan Lorden	Provost and Vice Chancellor for Academic Affairs
UNC-CH	Valerie Pruvost	Senior Lecturer, Romance Languages
UNC-CH	Abigail Panter	Professor of Psychology
UNCG	Lisa Tolbert	Associate Professor of History
UNCG	Jonathon Zarecki	Associate Professor of Classical Studies
UNCGA	Kate Henz	Senior Director for Policy and Funding Analysis
UNCGA	Suzanne Ortega	Senior Vice President for Academic Affairs
UNCP	Richard Gay	Associate Professor of Art
UNCP	Rachel Smith	Associate Professor of Chemistry
UNCSA	**Mike Wakeford	Social Science
UNCW	Jennifer E. Horan	Associate Professor of Political Science
UNCW	Cara Cilano	Professor of English
WCU	**Erin McNelis	Associate Professor of Mathematics
WSSU	Stephanie Dance Barnes	Assistant Professor of Cell and Molecular Biology
WSSU	Brenda Allen	Provost and Vice Chancellor for Academic Affairs

** = FAC_SDI Member

e-mail Address	Faculty?	Nominated By	Subcommittee 1	Subcommittee 2
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roseec@appstate.edu		FAC_SDI		
dcsengupta@mail.ecsu.edu	?	Provost Office/GA	Core Competencies	
martinezp@ecu.edu	f	FAC_SDI	Core Competencies	Engaging Experts
BUNCHA@ecu.edu		Provost Office/GA	Engaging Experts	Communications
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allenba@wssu.edu		Provost Office/GA	Core Competencies	

Section Size/Efficiencies Workgroup Report

Meeting Dates: 6/4/13, 6/28/13, 8/9/13 (Scheduled for 2 pm), several conference calls involving Warrick Arden, Kerrie Dixon, Andrew Morehead and various others to discuss progress.

The committee is proceeding forward on two fronts. There will be a short-term report (more details below) with a planned longer-term study analyzing the UNC-GA data that will be led by Paul Williams (NCSU School of Management).

The short-term report (necessary to meet the timeline requirements) will consist of three sections covering current scheduling practices, a literature review of student success and section size, and a set of recommended best practices. The longer-term analysis plans to focus on student success and section size data in the UNC system.

Current scheduling practices have been obtained from App State, UNC-A, UNC-CH, ECU, WCU, and UNC-W.

Literature reviews have been completed for psychology and writing intensive classes including comp and others. We have assigned committee members looking at research literature in history, math, foreign languages, and business/economics. In addition, we are collecting any data individual institutions have collected in the disciplines represented on the committee.

We have a summary of the AACU report on sections sizes and particularly the need for small section sizes in certain areas and types of courses. Some data has been collected on scheduling in the U Georgia Campuses.

Section Size Committee

School	Name(s) for scheduling processes and practices	Name(s) for information on section size and student success among major disciplines	Curriculum Choice
UNCG	Denise Baker	Denise Baker	Brief summary of the AAC&U's recommendations in <i>College Learning for the New Global Century</i> for high impact experiences such as freshmen seminars, undergraduate research, internships or individual study which require smaller sections
ASU	Neva Specht	Jim Toub & Neva Specht	Art History (Jim), History First Year Seminar (Neva)
WCU	Brian Gastle & Mark Lord	Brian Gastle	Info regarding student success and section size in English. Our organizations (National Council of Teachers of English, Modern Languages Assoc., Assoc. of Departments of English, Conference on College Composition and Communication, etc.) have position statements and research pieces on this very issue, since college composition is often a focus during debates about class size. While composition is not my area of specialty, I can pull together some of the work that is already out there
FSU	Sarah Baker	Samuel Adu-Mireku	
UNCA	Patricia McClellan	Lisa Friedenberg	Psychology
NCSU	Louis Hunt	Dr. Jo-Ann Cohen	Math
UNCW	Raymond Burt	Raymond Burt	Foreign Languages
UNCC	Richard Buttimer	Richard Buttimer	Business/Economics
UNC-CH	Roberta Norwood	Roberta Norwood	Foreign Languages
WSSU	Carmen Wigfall	Letitia Cornish & Grad Student	

Strategic Directions Plan Implementation, E-learning Workgroup

The 2013 UNC Strategic Directions plan included a number of goals for which e-learning (or, more commonly, online education) has the potential to make a significant contribution. (Appendices relevant to each of the following discussion points are attached to the end of this document). In the General Administration list of Strategic Directions Action Items, e-learning was specified as part of the “Strengthening Academic Quality” goal (see Appendix A), although its implications obviously extend to other Strategic Directions goals (such as “Raising Degree Attainment”). To this end, General Administration established an E-learning Workgroup to develop recommendations for University online education policy.

The Workgroup is comprised of 13 members. 7 were appointed by General Administration; 5 (Jon Davis, Chet Dilday, Steve Leonard, James Osler, and Jimmy Reeves) were appointees drawn from Faculty Assembly nominees (via the Faculty Assembly Committee for Strategic Directions Implementation [FAC_SDI]). Steve Leonard also serves as the Co-Chair of the Workgroup. (See Appendix B)

Although the Strategic Directions Action Items included a number of e-learning related initiatives, uncertainties about the University budget led General Administration at this time to limit the scope of online education policy development. The only initiative currently under consideration is a faculty preparation and qualifications policy. The charge of the Workgroup is to recommend a University-wide set of standards and processes for ensuring faculty have the skills required to develop and deliver high-quality online coursework. (See highlighted section of Appendix A)

Because of perceived pressures from the Board of Governors for UNC to respond to recent national trends in online education, the Workgroup was asked to quickly produce an initial and tentative draft of policy recommendations for online instructional personnel. This work was recently completed, and the recommendations draft (Appendix C) has been turned over to General Administration for immediate use. Final drafting, full review, and formal approval of these recommendations are contingent on procedures to be determined by the Workgroup.

The Faculty Assembly nominees on the Workgroup have made academic excellence and instructional quality the primary principles of their committee contributions. Faculty control of course content and organization, faculty participation in institutional decision-making bearing on online instruction, and robust instructional support for faculty teaching online courses, have been emphasized as critical “best practices” for realizing the goals of excellence and quality.

At this time the Workgroup does not have any other substantive work pending. In the immediate short term, the Workgroup will be discussing procedures for vetting and approving its policy recommendations.

Report submitted by Stephen Leonard, 30 July 2013

APPENDIX A: Strategic Plan Implementation Strategy, E-learning Initiatives

No.	<u>SD Goal Item</u>	<u>Action</u>
	2	STRENGTHENING ACADEMIC QUALITY
		IMPLEMENT A COMPREHENSIVE E-LEARNING STRATEGY
44	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.
45	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)
46	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).
47	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)
48	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)
49	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)
50	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.
51	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.)
52	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)
53	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)

APPENDIX B: E-learning Workgroup Membership

- FSU Chet Dilday, Associate Professor of Social Work (FA nominee; FAC_SDI member)
- NCCU James Osler, Associate Professor of Education (FA nominee)
- NCSSM John Davis, Biology; Director of Distance Education and Extended Programs (FA nominee)
- UNC-CH Steve Leonard, Associate Professor of Political Science, Faculty Assembly Chair-Elect (FA nominee; FAC_SDI member). WORKGROUP CO-CHAIR
- UNCW Jimmy Reeves, Chair and Professor of Chemistry
- ECU Elizabeth Hodge, Associate Professor of Education
- UNCG Roy Schwartzman, Professor of Communication Studies
- ECU Marilyn Sheerer, Provost and Senior Vice Chancellor for Academic Affairs. WORKGROUP CO-CHAIR
- FSU Bonnie Grohe, Assistant Professor of Criminal Justice and Interim Director of the Office of Faculty Development
- NCSU Diane Chapman, Teaching Associate Professor of Leadership, Policy, and Adult and Higher Education; Director of the Office of Faculty Development
- UNCC Garvey Pyke, Associate Director, Center for Teaching and Learning
- UNCGA Alisa Chapman, UNC Vice President for Academic and University Programs
- UNCGA Margaret O'Hara, UNC Director of E-Learning

APPENDIX C: E-learning Instructional Personnel Policy DRAFT

UNC STRATEGIC DIRECTIONS E-LEARNING WORKING GROUP

RECOMMENDED POLICY ON E-LEARNING¹

INTRODUCTION

E-learning (or online instruction) has become an increasingly important mode of teaching and learning in American higher education. In 2008, nationwide estimates were that more than 20% of undergraduates had enrolled in at least one online course, and as many as 4% of undergraduates were matriculating in online degree programs (Radford 2013). For fall 2013, the percentage of undergraduates enrolled in an at least one online course is expected to top 45% (re:fuel College Explorer 2013).

THE IMMEDIACY OF E-LEARNING AT UNC

The particular attractions of e-learning for promoting the goals of the UNC Strategic Directions initiative (increasing degree attainment, strengthening academic quality, serving the people of NC, maximizing efficiencies, ensuring University accessibility and stability) are twofold.

First, the flexibility and accessibility of online instruction have encouraged the identification of e-learning as a useful approach for delivering educational opportunities beyond those that can be realized in traditional campus-based instruction. Among the more promising possibilities of e-learning are

- increasing opportunities for educational attainment for a broader student population,
- enabling those with family and work obligations to participate in postsecondary learning,
- allowing individuals with partial fulfillment of degree requirements to complete their programs,
- facilitating various continuing education opportunities,
- supporting curricular breadth for institutions with limited facilities and resources,
- supplying aspiring high-school students with college-level course experience,
- underwriting post baccalaureate professional development certification programs, and
- providing vocational certification training.

Second, E-learning offers the opportunity to develop and assess new pedagogical methods and approaches that may enlarge and enrich the teaching and learning experience in traditional face-to-face courses, including "hybrid" courses that can capitalize on effective pedagogy evolving from different modes of instructional delivery.

¹For the purposes of this policy E-Learning defined as a formal educational process in which the exclusive or primary mode of instruction occurs between students and instructors separated by physical distance, and involving the use of digital technologies. These instructional modes may be synchronous or asynchronous.

POLICY CONSIDERATIONS

The primary concern for developing an e-learning policy is the realization of teaching effectiveness and learning outcomes that meet the highest standards of excellence.

The challenges for e-learning in this regard are not unique to these modes of instruction, but the extant research evidence as well as the experience of those teaching in a variety of instructional settings suggests that addressing these concerns in an e-learning context requires forms of preparation in course design and delivery that may not be typical in the teacher training received by instructional personnel.

Additional relevant considerations are specific to UNC institutional arrangements. These are primarily matters of resource utilization and institutional organization. An effective e-learning policy should make efficient use of the strengths of disciplinary and/or student populations for each of the UNC system's constituent institutions, and maximize the use of resources and skills at each institution and across the system.

UNC is uniquely situated to become a national leader in developing a program of e-learning opportunities that serves a broad and diverse population of students, is adaptable and flexible for a variety of educational purposes, and produces highest-quality learning outcomes. The purpose of this policy is to facilitate best practices that would be conducive to these ends in the selecting and preparing instructional personnel.

E-LEARNING INSTRUCTIONAL POLICY

This policy is organized in three sections. Each addresses a category of considerations central to a robust policy for e-learning instructional personnel.

The **Personnel** section addresses the appointment of e-learning instructors.

The **Design** section addresses considerations of course construction for e-learning instructors.

The **Delivery** section addresses issues of implementation relevant to e-learning instructors.

Further discussion of explanations and justifications for policy recommendations may be found in the appendices.

PERSONNEL

The identification, recruitment, and appointment conditions of e-learning instructional personnel are the foundation of a successful e-learning program. The following are essential to those concerns.

- **INSTRUCTOR STATUS QUALIFICATIONS:** Personnel qualified to teach e-learning courses shall only be those possessing recognized disciplinary or substantive expertise in the area(s) of instruction. Further qualifications regarding instructional methods training are functions of course design and course delivery policy.
- **APPOINTING AUTHORITY:** Determination of disciplinary or substantive qualifications of instructional personnel shall be made using established procedures for academic appointments in the academic units responsible for approval of credit-carrying instruction in the specific areas of disciplinary or substantive expertise.
- **RECRUITMENT:** Identification and recruitment of instructional personnel shall be subject to established procedures of academic appointment searches required by the relevant credit-granting institutional unit(s).
- **CONTRACTUAL CONDITIONS:** Terms of instructional appointments, including but not limited to: instructor responsibilities and rights, compensation rates, employment benefits, promotion and tenure implications of e-learning appointments, and proprietary claims of all intellectual goods used in the delivery of e-learning courses, shall be subject to established conditions of instructional employment required by the relevant credit-granting institutional

unit(s).

DESIGN

E-Learning instructors should be familiar with, attentive to, and supported in addressing the following considerations regarding online course design. Each of these can and should be parsed with any number of nationally recognized, validated criteria for assessing online course quality.

- **STUDENT COHORTS:** Courses shall be designed as appropriate for specific student populations. Online courses must be subject to established forms of institutional course approval. In addition to the specification of minimum academic prerequisites, and necessary academic skills and skill levels, formal review of online courses should also include provisions for assessing student technology skills and equipment minimally required for successful course completion.
- **STUDENT READINESS:** Institutional online instruction support shall include mechanisms or procedures for assessing student readiness for e-learning coursework. Instructors must be provided with evidence that registered students have the necessary technical skills to navigate the online course site, learning management system, and all online materials used in instruction.
- **COURSE CONTENT:** Instructors are responsible for determining discipline- and topic-specific materials available and appropriate for e-learning instruction in the particular substantive area of instruction.
- **STUDENT ACHIEVEMENT ASSESSMENTS:** The goal of assessment strategies is to evaluate student learning based on stated learning objectives.
 - Learning objectives shall be clearly specified, as well as comparable to and consistent with similar campus-based courses.
 - Assessment instruments shall be sequenced, varied and appropriate to the forms of achievement being assessed, and shall be approved by the normal, in-place academic approval processes on each campus and shall be subject to the normal, in-place academic approval processes on each campus..
 - E-learning instructors shall use systematic means of identifying and notifying students at risk of non-completion or failure. These should be correlated with or complemented by notification procedures used in campus-based courses.
- **STUDENT ACADEMIC SUPPORT SERVICES:** Students enrolled in online courses shall have access to academic achievement support services appropriate for required course skills.
 - These services shall be comparable to those available to students in on-campus courses.
 - Main or central course documents or platforms shall have clearly identified information about, and means of access to, student academic support services.

DELIVERY

E-learning instructional personnel shall be experts in their disciplines, have access to support services that address the principles of effective online course design, and they must be fully supported to meet the pedagogic and technical challenges of the courses they teach. With regard to this last concern, appropriate arrangements for e-learning instructor support must at minimum address the following considerations:

LEARNING MANAGEMENT SYSTEMS: Delivering course content and managing learning activities in higher education, and especially in online courses, is typically handled through a learning management system (or LMS). Institutions offering online courses shall provide access to LMS, or comparable alternative arrangements, approved by established institutional academic instructional policy-making bodies. Institutionally approved LMS (or alternatives) must have robust advising and support structures sufficient for instructors to provide effective course delivery, viz:

- Instructors shall be conversant with the features and capabilities of the LMS (or systems) provided by the institution through which their course(s) is (are) offered. Institutions shall provide or support access to training modules or services for LMS end-users.
 - Instructors shall be familiar with technical support services that may be required, and those that are available, for advising on the use of the LMS they employ. Institutions shall provide or support access to technical support services for LMS end-users.
 - Exceptions to the requirements immediately above shall be made in instances where instructors choose to deliver and manage their courses using platforms, systems, or programs other than those supported by the accrediting institution. However, in these cases instructors must assume full responsibility for all essential services, specified in other parts of this policy, which may be contingent on the use of an institutionally supported LMS.
- **SOFTWARE:** Instruction in many courses may be significantly enriched by specialized computer software.
- Instructors shall be conversant in the student interface of any software they require for their course(s).
 - Instructors shall, as far as possible and appropriate, adopt software programs that maximize student access and ease of use, and minimize financial costs to students and/or institutions.
 - In instances where instructors assign software in their own courses for which they have a proprietary interest that produces a revenue stream, any such arrangements must be reported to and remain fully transparent for students and institutions and shall adhere to all institutional policies regarding conflict of interest, intellectual property, and copyright.
- **COURSE ASSESSMENT AND QUALITY ASSURANCE:** Online course quality assessment and student evaluation procedures shall be subject to all standards specified by established institutional academic instructional policy-making bodies. Where accommodations for online courses require alternative or specialized modes of assessment, institutions must provide evaluation instruments for online courses comparable to those used in campus-based courses.

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