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Dean

**TO: Faculty and Staff**

**FROM: Mike Smith**

**DATE: July 19, 2016**

**SUBJECT: Implementation of Strategic Foresight Recommendations**

This memo is my response to the recommendations from the three strategic foresight committees. I have not provided all of the background for each recommendation, and I also have not described the process that each committee followed to get input and feedback before finalizing their recommendations. You can get all of that information from each foresight committee's report under School-Wide Planning on the School's intranet.

## **Strategic Foresight Committee #1**

***Charge:** Make recommendations that will strengthen the School's distinctive approach to engaged scholarship. Make recommendations to ensure that the School continues to function as One School, One Faculty, and One Team.*

### Faculty Recommendations

Faculty members participated in a series of facilitated roundtables that explored how their work is important to the School. They also discussed the challenges associated with the School having a multi-disciplinary faculty. The other discussion topic was how faculty members can be encouraged and supported in their engagement with the broader campus community.

1. **Recommendation:** Faculty APT Discussions. Hold annual faculty discussions about the APT policy to help faculty understand the different types of work that their colleagues are doing within the context of promotion and tenure.

**Next Steps:** Create new Academic Policy Advisory Committee (APAC). The committee will be composed primarily of tenure-track faculty members and it is intended to focus on issues surrounding reappointment, promotion, and tenure. The committee also will include fixed-term faculty members so that it can address reappointment and promotion issues

affecting them too. APAC will also be a forum to discuss the University's post-tenure policy and its implementation at the School.

Faculty members have expressed an interest in meeting only with their faculty colleagues to discuss issues of common interest. In order to address that interest, the committee in its discretion may raise and explore other issues affecting the work of faculty members.

APAC will be chaired by the Associate Dean for Faculty Development and the Dean will appoint faculty representatives from different ranks. Committee members will serve for a fixed term in order to give different people the opportunity to participate.

APAC will hold at least one annual discussion with faculty members about the School's APT policy. This meeting will be an opportunity to raise questions about the policy and its implementation, as well as to suggest improvements in the policy. It will be up to the committee to decide whether tenure-track faculty and lecturers should meet together or separately, which may depend on the specific issues under consideration. Faculty members will be given the opportunity to suggest agenda items for the annual APT policy meeting. This meeting also will help faculty understand the different types of work that their colleagues are doing in order to meet the requirements for promotion and tenure.

**Timing:** Appoint the members of the new Academic Policy Advisory Committee (APAC) and hold its organizational meeting by September 1, 2016.

2. **Recommendation:** Faculty Advisory Committee Discussions. Hold annual discussion with faculty about the role of faculty advisory committees to ensure that all faculty members are getting uniform information about the APT process.

**Next Steps:** Create new Academic Policy Advisory Committee (APAC). APAC will hold at least one annual discussion with faculty members about the School's faculty advisory committees. The committee will have the discretion to explore issues related to the terms of the advisory-committee policy—whether the number of required teaching observations by a teaching mentor is appropriate, for example. APAC's annual discussion with faculty also will include how the committees are interpreting and applying the policy in their advice to faculty members. The annual meeting will be an opportunity to make sure that everyone is on the same page in setting expectations for faculty advisees about what is required for satisfactory progress and promotion. The committee may choose to meet with faculty advisory committee members and faculty advisees separately if that would be helpful in gathering information and planning for the annual discussion with all faculty members.

**Timing:** Appoint members of the new Academic Policy Advisory Committee (APAC) and hold its organizational meeting by September 1, 2016.

3. **Recommendation:** Greater Faculty Involvement in Decisions. Involve appropriate faculty in decisions beyond just APT votes. For example, faculty should be consulted first regarding faculty hiring decisions.

**Next Steps:** Consultation on Faculty Hiring Decisions. Our practice has been to consult with the Dean's Advisory Committee (DAC) before filling open faculty positions—whether existing positions that become vacant or new positions. The next step has been consultation

with the entire faculty. Some faculty members have felt that the faculty consultation was not a meaningful one because the decisions seemed nearly final by the time it came to them at a faculty meeting. That certainly was not the intention. In response to this recommendation, as well as feedback during the process, proposals about faculty hiring will go to the Faculty Meeting for feedback and not to the DAC. I will continue to consult with the Management Team.

Create Agenda Committee for Faculty Meetings and Increase Faculty Input on Policy Issues.

The focus and timing of the current Faculty Meeting will shift slightly in order to provide faculty members with a greater voice in policy discussions and decisions affecting the School. In addition to chairing the quarterly Faculty Meetings, the Dean will appoint and chair a Faculty Meeting Agenda Committee to create the agenda for each meeting. The current monthly schedule is too frequent to generate meaningful policy issues for discussion at each meeting. The revised Faculty Meeting will shift from monthly to quarterly and the participants will continue to be faculty members and EPA professionals doing faculty-like work. The first priority for the Faculty Meeting will be policy issues affecting faculty members and EPA professionals doing faculty-like work, along with whatever information sharing may be appropriate. Special Faculty Meetings may be called as needed.

**Timing:** The decision to consult with all faculty members about filling open faculty positions—without first consulting with the DAC—happened with the discussion about the future of the performance management position when David Ammons enters phased retirement. In other words, this recommendation already has been implemented and put into practice. The first meeting for the revised new Faculty Meetings will be in October 2016, and the other meetings will be held in January, April, and July. I will appoint and meet with the Agenda Committee in time to plan for the October 2016 meeting.

4. **Recommendation:** Encourage Greater Communication and Collaboration Among Faculty. Encourage more communication and collaboration among faculty in order to help them be successful. An example would be rewarding collaborative writing projects across different disciplines.

**Next Steps:** Create new monthly “Faculty Lunches with the Dean.” Four faculty members from different fields will be invited to share something about their work with one another and with me during a 90-minute lunch meeting. The work that is shared could be a research and writing project, a particularly interesting example of advising, or a new program that takes an innovative approach to teaching. One goal of the lunches is to help faculty learn more about the work of their colleagues, which may lead to an identification of mutual interests and greater collaboration. In addition to hosting the lunches, I will blog about the information that is shared so that everyone can learn about the work of different faculty colleagues.

In terms of rewarding collaboration among faculty, the School’s Appointment, Promotion, and Tenure Policy already “encourages collaboration and partnerships” and provides that “collaborative contributions by faculty members are valued as much as individual contributions.” (Sec. 6) Each faculty member must decide if collaboration makes sense in light of its ability to advance their individual work and our collective mission. The School will focus on improving communication about our work so that faculty members can more easily identify opportunities for collaboration, and it will continue rewarding whatever collaboration takes place.

**Timing:** Schedule and hold the first set of faculty lunches in September 2016.

5. **Recommendation:** Encourage University Involvement by Faculty. Encourage faculty to report on their collaborative activities across campus, such as committee work, interdisciplinary initiatives, cross-departmental research, and other substantive projects, and make it a consideration for distinguished faculty awards or create a separate faculty award for university engagement.

**Next Steps:** Service on University Committees. I generally agree with the feedback from the roundtables that it is advantageous to the School for faculty members to be engaged in the broader academic community at Carolina. Many University faculty members know about the School primarily through their service with our colleagues on committees. Our faculty members always make a good impression through those activities, and that translates into a good impression of the School. The subcommittee's report indicates that there was confusion during the roundtables about whether faculty members receive internal credit for those activities. The faculty activity log includes an entry for service to the University, which is a factor drawn from our Faculty Salary Policy, and faculty members receive credit for it in decisions about merit salary decisions. I support faculty who want to be engaged in campus administrative work. At the same time, however, it can consume large amounts of faculty time and whether to spend time on it really is a judgment call for each faculty member. Our faculty members have been well-represented on campus committees and we have been very good citizens of the University.

Campus Interdisciplinary Work. The question of faculty involvement in substantive work through interdisciplinary initiatives and cross-departmental research presents a slightly different issue. It primarily is a decision for each faculty member based on the context of their work and whether it advances the School's mission. I can imagine that collaborating with one or more faculty members from another department would add enormous value to some substantive projects, and in those cases I support it completely. In other cases it might not add anything to a project. I would not want faculty members to pursue interdisciplinary work for its own sake. The overall benefit to the School does not justify encouraging faculty members to pursue interdisciplinary work unless they independently believe that it significantly advances their work. For that reason I would rather not recognize interdisciplinary research through separate awards. It will be recognized and rewarded as any other research, and I encourage faculty members to highlight it either in their faculty activity report or their summary assessment.

**Timing:** No action is required.

#### Faculty and Staff Recommendations

Faculty and staff participated together in conversations led by Rebecca Ryan related to the following issues that emerged from the Foresight Lab last June: (1) the School's mission of engaged scholarship, (2) the concept of faculty and staff working together as "One School," and (3) possible future for the School that would be exciting and possibly have an even greater impact.

1. ***Recommendation:*** More Faculty-Staff Information Sharing. Create more opportunities for formal, structured interaction among faculty and staff to share how their work is advancing the School's mission.

***Next Steps:*** The feedback was very positive from the joint faculty-staff conversations that were modeled after World Cafés, and people easily and enthusiastically described how their work supported the School's mission. Each year we will hold a similar conversation between faculty and staff to share how their work is advancing the School's mission. I will appoint a small Community Conversations Committee of faculty and staff to choose the topic and plan each year's conversation. It will be co-chaired by a faculty and a staff member—and it will be supported by the new Director for Strategy and Innovation. The main point of these joint conversations is to promote greater understanding of how everyone contributes to the School's mission, as well as to produce even greater alignment between faculty and staff in working together as "One School." The conversations also should include the opportunity for people to share ideas about how the School can improve its work in the future—both in terms of what we do (program and activities) and how we do it (operations). The conversations are not necessarily intended as strategic planning exercises, though in some years they may involve discussions about possible strategic priorities.

***Timing:*** Appoint the faculty-staff Community Conversations Committee by November 2016 so that they can plan the next joint conversation for spring 2017.

2. ***Recommendation:*** Improve Communication about Clarify Roles. Clarify roles in the School and illustrate relationships among employees (faculty, administration, and staff.).

***Next Steps:*** The conversations facilitated by Rebecca Ryan revealed a sense that we could do a better job of promoting and living the value of "One School." The themes from the discussions focused primarily on improved communication, especially about how everyone's work is linked together and supports the mission. People expressed support for the value of greater information sharing within the School.

New and Existing Opportunities for Communication. The steps already mentioned for some of the other recommendations have the potential to improve communication and understanding about the work of different people in the School. The Faculty Lunches with the Dean will promote information sharing among faculty members, and I will pass that information along to everyone through my blog posts. The annual faculty and staff conversation organized by the Community Conversations Committee will give everyone the opportunity to talk about how their work advances the School's mission. In addition, the new quarterly Meet and Greet sessions held in the Atrium allow people to meet new colleagues and informally share information.

I will continue holding the Lunch and Learn with the Dean meetings, which are quarterly opportunities for faculty and staff members to come together and have wide-ranging conversations about the School. I begin each meeting by asking the participants to introduce themselves and talk briefly about their work. These informal lunch sessions are just one more way of meeting the interests expressed in this recommendation.

Change FED Meetings to Information-Sharing Meeting and Change Timing. The FED (Faculty, EPA Professionals, and Division Managers) meetings have been held once a month

for the last few years. The FED meetings sometimes have focused on sharing information, and at other times they have included discussions and feedback about policy questions facing the School. It has been a mix of things, and often we have cancelled the meetings because there was not a pressing enough agenda to justify a monthly meeting. The monthly FED Meeting will be replaced by a quarterly Information Sharing Meeting for the same people who have attended the FED meetings. The meeting will be planned by the members of the Management Team other than the Dean, and it will be chaired by Tom Thornburg, Senior Associate Dean. The focus will be on sharing information and helping people understand how their work connects with the work of others at the School. Special meetings may be called as needed.

In order to help clarify administrative roles, we will update our organization chart and post it on the School's intranet. We also will provide an accompanying document that briefly explains the roles of the administrative positions represented on the chart.

**Timing:** The first Information Sharing Meeting will be in September 2016, and the other meetings will be held in December, March, and June.

3. **Recommendation:** Entrepreneurial Initiatives. Communicate the way in which entrepreneurial initiatives support the School's mission.

**Next Steps:** One way to improve understanding about entrepreneurial initiatives is to talk about how they support the School's mission at an Information Sharing Meeting. There are several good reasons to do this now, which makes this recommendation especially timely. Kelley O'Brien and Tom Thornburg have been working to revise the existing entrepreneurial initiatives policy. I will ask Tom to finalize the policy and review it with faculty members, EPA professionals, and Division Managers. Another reason for talking about the policy is that it supports the School's mission by expanding our capacity in ways that are financially sustainable without additional state funds. Given the variety of threats to the School's budget, the approach to financial self-sufficiency reflected in the entrepreneurial initiatives policy needs to be a more intentional part of our work generally. One of the themes from the faculty and staff table discussions was a strong interest in the School reaching new audiences. It is difficult to imagine any significant expansion without following the model reflected in the entrepreneurial initiatives policy.

**Timing:** Discuss the School's entrepreneurial initiative policy at either the September or December Information Sharing Meeting depending on the amount of time needed to finalize the policy and whether other information-sharing priorities are more pressing.

4. **Recommendation:** Clarify Administrative and Operational Procedures. Clarify roles and responsibilities for procedures (i.e., administrative support, travel reimbursement, technology assistance, new program planning, etc.) to increase the efficiency of work flow.

**Next Steps:** The School now provides more and different kinds of faculty support than at any time in our history. That generally is a good thing. One challenge for faculty members and others is that it can be difficult to manage and coordinate the different kinds of support. How many different people must be involved in separate conversations about different activities? When the new Associate Deans for Operations and Administration arrive later this year, I will ask them to work with the Division Managers on streamlining and clarifying

the support operation so that it works more effectively and more efficiently for everyone—faculty and staff. This charge to them is consistent with my charge that they work together to reduce costs and generate more revenue. The streamlining and efficiency reflected in this recommendation will be an important part of their work. I fully support the recommendation's interest in clarifying our procedures, but my primary interest is in making things work better.

**Timing:** Charge the Associate Deans for Operations and Administration to begin working with the Division Managers on this priority when they arrive in fall 2016. Report to the School on the process they will use to address this recommendation in February 2017 and make a progress report in September 2017.

## Strategic Foresight Committee #2

**Charge:** *Make recommendations to reduce faculty time spent responding to advising requests and certain teaching and conference administration obligations in fields with the highest demand. The goal is to reallocate their time to higher-impact teaching, research, and advising. Consider how to expand the role of entrepreneurial initiatives, as well as the role of EPA professionals, students, and others in the School's work.*

1. **Recommendation:** Subject-Matter Assistants Pilot Program. Allocate resources to hire additional EPA professionals as subject-matter assistants to aid faculty members with research and advising work. Pilot the idea by asking for proposals from different faculty groups in order to see how this new type of position might help faculty members in different ways. Suggest elements for the pilot proposals and recommend the creation of metrics to evaluate the impact of any pilot efforts.

**Next Steps:** This recommendation focuses on the external pressures facing lawyer faculty members that are different from those facing faculty in other fields. The advising demands from public officials can be overwhelming. Unlike faculty in the public administration field, faculty members in legal fields do not have research assistants regularly assigned to them. The support for them also has declined in recent years with the elimination of the summer law clerk program.

Create a subject-matter expert position to work with faculty members in the criminal law field. The decision not to fill the criminal law faculty position occupied by Michael Crowell means that they are short-handed and under even more pressure. The increased strain on the group comes at a time when a core criminal law faculty member (Jessie Smith) is less available for advising because of intensive work as a reporter for Chief Justice Martin's Commission on the Administration of Law & Justice. The criminal law faculty have one of the highest demands for advising, which satisfies one of the proposed criteria for choosing a faculty field of work for the pilot. This will be a time-limited position—two years—because the funding for it will come from lapsing salaries in the vacant Crowell position.

Jeff Welty, Director of the Judicial College, already has provided a written proposal that addresses the issues identified in the recommendation, including the creation of metrics to evaluate the impact of this pilot. Christopher Tyner has agreed to be designated as the

subject matter assistant in the area of criminal law. It suits his interests and abilities— Christopher says that about 70% of his current work is with criminal law faculty. He will support the research and advising work of the criminal law faculty, and he may undertake a limited amount of basic teaching. This particular role is a pilot, though Christopher will remain a permanent employee of the School. I will ask Tom Thornburg to identify and supervise law students who can provide research assistance during the two-year pilot for non-criminal law faculty who have relied on Christopher.

Create a second subject-matter expert position to work with faculty members in the local government law field. This also is a two-year pilot. I will ask Kara Millonzi to work with her colleagues to provide a written proposal that addresses the issues identified in the recommendation, including the creation of metrics to evaluate the impact of the pilot. I encourage them to be creative in thinking about the kinds of people who might be good candidates for the position. For example, would it be possible to style the position as a fellowship for people working in a city or county attorney's office. I will work to identify recurring funds to continue the position if the pilot is successful.

**Timing:** Jeff Welty already has developed a proposal (including metrics) for how the criminal law faculty would define a subject-matter assistant position in their field. Ask Kara Millonzi to develop a similar proposal for faculty members in the local government field. Once her proposal is approved, Maura Murphy will work with Kara to fill the local government law position for a two-year pilot.

2. **Recommendation.** Faculty R&D Time. Adopt a policy that encourages faculty members to take six weeks of dedicated research and development time each year to engage in intensive and concentrated work. The time could be spent on field work, research and writing projects, course development, innovation projects, or other similar kinds of work. For example, the time might be spent on long-term professional development that will not lead immediately to a tangible product. During this time period the expectation is that a faculty member generally would not respond to advising requests. Ideally the person also would not be teaching or involved in administrative work. In order to maintain the value of our advising work, faculty need time to develop and refine the expertise that informs their advising. The recommendation identifies components of the policy that will help to facilitate the cultural change required for this initiative to be successful.

**Next Steps:** Frayda Bluestein will work with the Academic Policy Advisory Committee (APAC) to develop and implement the proposed policy consistent with the recommendations of the foresight committee. The report identifies a number of considerations that will be needed to change the School's culture and make it possible for faculty members actually to take advantage of the policy. This policy will not succeed without changes in our culture. In addition to addressing internal issues, the committee should develop a strategy for communicating with our clients generally about the reasons for the policy and how it will serve their interests over the long haul. It will be much more difficult to change the School's culture about setting aside R&D time if our public-official clients see it as a problem for them and communicate that to faculty members.

APAC should work quickly to create a draft policy and implement it on a pilot basis. The goal should be to address the obvious issues as soon as possible without trying to perfect the initial policy. The Strategic Foresight Committee struggled with how many weeks should be



set aside each year by faculty members for R&D time. In its draft policy and for purposes of the trial, APAC should describe the amount of R&D time as ranging from four to six weeks. Based on their assessment of faculty experience during the pilot, APAC should make a final determination about the appropriate amount of annual R&D time. Absent special circumstances, the expectation should be that all faculty members will take an R&D leave and record it in their annual faculty activity report.

In addition to adopting the draft policy, the committee should identify a small number of faculty representing different areas of expertise who will agree to take a pilot leave under the policy during fiscal year 2016-17. APAC should evaluate the experience of faculty who pilot the R&D time, make any needed changes in the policy, and implement the revised policy for all faculty members as soon as possible.

**Timing:** APAC will create the draft R&D Policy no later than November 1, 2016. APAC should identify faculty members who will pilot the R&D time and develop an appropriate timeframe for completing their four-to-six week leaves. APAC will evaluate the leaves with the faculty members who piloted them, revise the policy, and implement it for all faculty members as soon as possible.

3. **Recommendation:** Curriculum Developers/Client Specialists. Allocate resources to hire EPA professionals to supplement the support provided by existing program managers by assuming responsibility for higher-level planning and coordination that in many cases is now done by faculty members. This new position would provide the following kinds of support: (1) track national conferences to identify possible topics and speakers for School programs; (2) work directly with client groups to plan conferences and other educational activities; (3) evaluate potential speakers; (4) work with outside speakers to ensure effective presentations, and (5) engage in general outreach efforts with client groups. The exact nature of the work will vary depending on the requirements and circumstances of the faculty members to be supported by the person. Pilot the idea by giving different faculty groups the opportunity to submit proposals.

**Next Steps:** We will pilot this idea for two years in the Courts Group by reallocating the vacant position that had been occupied by Audrey Williams. She was Co-Manager of the Program Support Division with Brian Newport. The funding for Audrey's position came from funding for the Judicial College, and Jeff Welty would like to use the funding to create a position that matches the proposed Curriculum Developer/Client Specialist. I am taking this approach rather than soliciting proposals in order to take advantage of existing funding. Brian will assume sole responsibility for managing the Program Support Division. Jeff will work with Maura Murphy to create and fill this new position. Given the School's budget constraints, we will evaluate the impact of this position in the Courts Group after two years before deciding whether to expand it into other areas of the School. I will ask Jeff to identify data or metrics that will help in identifying the value of this new position. If the pilot is successful, we will need to find recurring funds before expanding it into other areas of faculty work.

**Timing:** Jeff Welty already is working with Maura Murphy to create and fill this new position.

4. ***Recommendation:*** Consistent Full Service Event Planning for All Courses and Conferences. Review all course and conference needs and ensure that sufficient support is available to provide high quality, consistent, full-service event planning and management for each course and conference. Full-service event planning already is provided in some areas of the School, but the level of service is inconsistent and uneven. The result is that some faculty members spend too much time planning and administering courses and conferences—sometimes even exceeding their time spent on program content.

***Next Steps:*** The Associate Dean for Operations is responsible for overseeing the program support provided to faculty members for courses and conferences. That position had been filled by Todd Nicolet and currently is vacant. We are using a search firm to identify candidates and I hope to have someone on board by fall 2016. The new Associate Dean's highest priority will be conducting a comprehensive review of how we support faculty in planning and administering programs. This also will include evaluating the earlier recommendation for providing a higher level of support by creating a new category of curriculum developers/client specialists. There need to be much clearer expectations around the type and level of support provided by program managers, and we need to see if the support can be provided more efficiently given our limited financial resources.

***Timing:*** Charge the Associate Dean for Operations with conducting a comprehensive review of how we support faculty in planning and administering programs when he or she arrives in fall 2016. Report to the School by March 2017 on the process that will be used to address this recommendation and make a progress report in October 2017.

### **Strategic Foresight Committee #3**

***Charge:*** *Develop strategic initiatives that respond to the most important trends identified as high-certainty and high-impact during the Foresight Lab.*

1. ***Recommendation:*** Expand Curriculum of the Judicial College. Expand course offerings in the Judicial College to more closely resemble a traditional tiered educational curriculum—with introductory, intermediate, and advanced courses. The development of a more robust curriculum is the first step toward a longer range goal of creating certification designations for judicial officials—like the existing juvenile certification program for district court judges. Another potential phase of extending the curriculum could be the creation of a Masters in Judicial Studies Program.

***Next Steps:*** High-Level Administration Professional. The first step recommended in expanding the curriculum is the addition of a high-level administrative professional who can help faculty design appropriate curricula and develop courses. I have agreed to reallocate the vacant position that had been occupied by Audrey Williams to create this new position, which is consistent with the recommendation from Strategic Foresight Committee #2 to create a new category of curriculum developer/client specialists.

Develop Expanded Curriculum. The next step is for Jeff Welty, as Director of the Judicial College, to lead his colleagues in the Courts Group in developing a proposal that includes the

components of an expanded curriculum. It should include existing and new courses that will be part of a core, tiered curriculum, as well as any electives that might be offered regularly and others that might be offered as needed to address emerging issues.

Business Plan for Expanded Curriculum. A closely related step is the development of a business plan to generate the funding needed to implement the expanded curriculum. The funding model for our courts programs is different than the model for our local government programs. In essence it is a single-payer contract with the Administrative Office of the Courts (AOC) that pays for all training and publications provided by the School to court officials. The AOC must agree before anything can be added to the master contract. It would be wise to include the AOC early in conversations about a curriculum in order to encourage their support for any new funding that would be required.

The Judicial College has lost a significant amount of its original \$1 million legislative appropriation through budget cuts over the years. The largest one was part of a university-wide cut for centers and institutes. In other years the School has taken money from the Judicial College budget to meet legislative cuts because the money had not been used. I recently postponed recruiting for a needed criminal law position in the Courts Group because we may need it to help absorb future cuts. Because the Judicial College has absorbed a greater share of budget cuts than any other field of faculty work, I will make it a priority to provide targeted, one-time investments to support the proposed curriculum if the AOC is unable to provide funding to support it. In addition, I will make private funding for an endowment to support the Judicial College and the expanded curriculum a priority for the School's capital campaign.

**Timing:** I will ask Jeff Welty to develop a planning process and a timeline for developing an expanded curriculum and a business model to support it.

2. **Recommendation:** Center for Public Leadership. Create a Center for Public Leadership (CPL) under which all of the School's leadership and governance programs will be organized. CPL will offer expanded instruction, advising, and research to public organizations at every level of government, including judicial officials.

**Next Steps:** Entrepreneurial Initiative and Faculty Director. This is an exciting and potentially high-impact initiative for the School. It is only possible to imagine this big idea because our colleagues in the Leadership Group have developed an impressive set of programs that already form the core of a public leadership curriculum. These programs will come under the umbrella of CPL—Effective Supervisory Management Program, Leading for Results LGFCU Fellows, Advanced Leadership Corps, and Public Executive Leadership Academy. They provide an excellent launching pad for the next phase of the School's work in the public leadership field.

CPL needs to operate under the School's entrepreneurial initiative policy, which has implications for how it develops and operates. The first step is to identify and appoint a faculty administrator who will be responsible for managing the initiative. Rather than recruiting a new faculty member as recommended—for which there are no existing resources—I believe it is more strategic to appoint an existing faculty member from the leadership group who understands our existing programs as well as the School's culture and values.

After consulting with the Leadership Group, I have asked Peg Carlson to take responsibility for directing CPL and she has agreed. I have committed to provide start-up funding from the School of Government Foundation for five years to support hiring an EPA professional who will occupy an operations role to be determined by Peg in consultation with the Leadership Group. The position needs to be covered by funding from CPL revenue no later than the end of five years.

Collective Commitment from the Leadership Group. The proposal for CPL must have a meaningful collective commitment from Peg and her leadership colleagues or it will not succeed. I have talked individually with everyone in the Leadership Group and they have expressed support for CPL and for Peg. Before moving ahead, however, I will ask Peg to design a process that clarifies roles and expectations for faculty and others who will be involved with CPL. The process needs to determine if faculty members are willing to commit enough of their time and energy to make CPL successful. We must examine what we do and how we do it in the area of public leadership at the School, as we determine how to best structure our services in this area. The number of faculty members involved in the work of CPL makes it different from other entrepreneurial initiatives, which typically only require the commitment of one faculty member who already is focused on the work.

Vision, Short-Term Plan, and Long-Term Plan. Assuming that Peg and I determine that there is the required collective commitment, she and the Leadership Group need to develop a vision for CPL along with a short-term plan and a long-term plan for achieving that vision. The person in the EPA professional position will be involved in developing and implementing the long-term plan. The initial focus should be on building the School's capacity to expand our existing leadership programs, and it will involve identifying other professionals who can deliver leadership training and related services. This will include developing a pipeline of people who we have determined can provide high-quality services under the sponsorship of the School. Capacity building and quality control are two of the greatest challenges facing CPL. The plan needs to include extending our leadership work beyond North Carolina, but that should not be the first or highest priority.

Judicial Leadership. A separate proposal to create a Judicial Leadership Academy was incorporated into this recommended priority. Leadership development for judicial officials should be viewed by Peg and the leadership faculty as an important and integral part of CPL. I believe that the name of this initiative should focus on public leadership broadly so that court officials will see themselves as included. Because "governance" generally does not describe the work of court officials, I believe it should be dropped from the name—though the work of CPL will include work with elected officials and governing board members.

Develop a Business Model. A parallel focus for CPL from the outset will be the development of a business model that allows the program to be self-sustaining within five years. Working with our incoming Dean for Administration, and presumably with many others, the CPL administration will need to develop a cost-allocation structure and a pricing structure that generates enough revenue to cover costs associated with CPL and that also generates a surplus for the School. The program also needs to explore possible grant opportunities to support the work of CPL.

Once there is at least a general program plan and a business model, I will work with Peg and the Leadership Group to include CPL as a centerpiece of our private fundraising for the capital campaign. My goal will be to create an endowment that will grow over time and expand our capacity to support the work of CPL.

**Timing:** I will ask Peg Carlson to develop a process for insuring that the collective commitment of the leadership group is strong enough to go forward with the development of CPL. That process needs to happen in a timeframe that allows me to make a final decision about the viability of CPL by October 1, 2016. If a decision is made to establish CPL, I will ask Peg to create a planning process and a timeline for creating a vision, a short-term plan, and a business model for CPL.

3. **Recommendation:** Data Center. Create a center to house, clean, and standardize public data for ourselves, our clients, and, potentially for the broader University. This initiative will help address the changing demands from our public-official clients for data-driven decision making. It has the potential to support demands for reporting, performance, and transparency that are beginning to face our clients.

**Next Steps:** The idea of creating a data center generally is a good one, and we need to explore taking steps in that direction without implementing the full vision that was included in the committee's recommendation. It is impossible in the current financial environment for the School to hire several new faculty members or EPA professionals as recommended. I also am concerned about trying to undertake too many new or expanded initiatives at the same time.

APPI. The Applied Public Policy Initiative (APPI) was the highest priority from our last strategic planning process and it is positioned through the good work of Aimee Wall, Dave Brown, and others to have an even greater impact. The School has invested in the Applied Public Policy Initiative (APPI) by hiring Anita Brown-Graham to serve as its Director and by hiring Dave Brown to serve as its Research Director. APPI's work always has included different kinds of data analysis. I will ask Anita to explore whether to include an expanded role for data, possibly even a data center, under the organizational umbrella of APPI. For example, the proposal to focus on services involving development data might be a good starting point as a part of APPI.

I recognize that this is not the vision for a data center that was imagined by the original proposal. It seems like a reasonable step under the circumstances, however, and over time it may lead to the broader idea.

**Timing:** Charge Anita Brown-Graham when she arrives in September 2016 to explore ways in which working with data in some of the ways outlined in the proposal might be a part of the evolving work of APPI.

4. **Recommendation:** Structured Conversations on High Impact Trends. Create a systematic way to keep the faculty informed about high-impact trends that could be important for the School. Commit to a systematic approach that includes structured and ongoing discussions around strategic topics.

***Next Steps:*** Director for Strategy and Innovation. This proposal builds on how we collected and discussed data as a part of the Foresight Lab in June 2015. It also has the potential to generate the kind of future thinking that Rebecca Ryan provided throughout the strategic foresight process. It is important for the School to understand the trends facing North Carolina and public officials so that we remain as relevant and helpful to our clients as possible. Once we have hired a new person to serve as Director for Strategy and Innovation, he or she will be responsible for implementing this recommendation. Consistent with the committee's recommendation, the goal is to find multiple ways to have discussions that share ideas about trends across the work of faculty members. In addition to sharing information, the discussions also should consider how people are currently incorporating particular trends into their work and whether the School should respond to certain trends with broader programmatic efforts. The Director for Strategy and Innovation will generate information about trends from a variety of sources, including from conversations with faculty members about what they are seeing in their work.

***Timing:*** Charge the new Director for Strategy and Innovation with implementing this recommendation when he or she arrives in fall 2016.