

**From:** [Katie Hagan](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Agenda for Tomorrow's Meeting  
**Date:** Thursday, January 12, 2023 7:01:29 AM

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Hi and Bob,

Happy New Year! I hope all is well and your return to campus after the break has not been too hectic. Mike and I are looking forward to our planning conversation tomorrow.

In our hour together, we'd like to cover the following:

1. Confirm project goals and hear any relevant news or updates on your side that may impact our work
2. Discuss project participation and communication -- we need to identify data leads and our approach for keeping key leaders and stakeholders informed
3. Establish a meeting cadence and review the overall timeline
4. Identify key next steps

Please let me know if there is anything else you'd like to add to our list.

Best,  
Katie

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**From:** Katie Hagan  
**Sent:** Tuesday, December 20, 2022 9:30 AM  
**To:** Bob Shea ; Mike Daly  
<mdaly@rpkgroup.com>  
**Cc:** >  
**Subject:** Planning Meeting - UNCG & rpk GROUP  
**When:** Friday, January 13, 2023 8:15 AM-9:15 AM.  
**Where:**

Katie Hagan is inviting you to a scheduled Zoom meeting.

Topic: Planning Meeting

Time: Jan 13, 2023 08:15 AM Eastern Time (US and Canada)

Join Zoom Meeting

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Meeting ID:

Find your local number: <https://us02web.zoom.us/j/83737022784>



**From:** [Mike Daly](#)  
**To:**  
**Cc:** [Katie Hagan](#)  
**Subject:** rpk/UNCG Project Leaders Meeting Follow-up from 1/13/23  
**Date:** Friday, January 13, 2023 11:00:41 AM  
**Attachments:** [Outlook-cs45exho.png](#)

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Hi [redacted] and Bob,

Thank you for spending time with Katie and me this morning. As we design the project communications materials we'd like to ensure congruency with any language used in ongoing academic review activities at UNCG. [redacted], if you can share any artifacts related to the faculty-generated program review process, the summary of program options created by [redacted], the most recent retreat with Vice-Chancellors/Deans, as well as the charge given to Deans and Chairs to review course schedules and general education offerings, that would be appreciated. Further, if there are others in your office that are supporting these (and other) efforts who rpk should coordinate with in these early stages, please let me know.

rpk's Next Steps:

- rpk will develop and share the project communication plan for your review. This will include:
  - project website language and content
  - project feedback form/FAQ document
  - outreach to data owners
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  - meeting cadence with established stakeholder groups
  - anticipated sharing of data and analyses
- rpk will coordinate the scheduling of regular meetings with:
  - [redacted], and his Chief-of-Staff
  - project leaders

UNCG's Next Steps

- Confirming project leaders with
- Identifying time for a one-hour project kick-off meeting with Provost Council, Deans Council, Academic Chairs, and Faculty Senate Executive Committee
  - rpk's current availability is: 1/23, 12n-2pm; 1/24, 10a-11pm and 2p-4p, 1/25, 11am-12n and 1/26, 10am-12n
- Sharing regular meetings schedules with these stakeholder groups along with a list of participants

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401  
mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Bob Shea](#)  
**To:** [Mike Daly](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: rpk/UNCG Project Leaders Meeting Follow-up from 1/13/23  
**Date:** Friday, January 13, 2023 11:44:12 AM  
**Attachments:** [Outlook-cs45exho.png](#)

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I have one add to UNCG's next steps:

- Ensure access to financial, personnel and academic data for rpk staff

On Fri, Jan 13, 2023 at 11:00 AM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:

Hi \_\_\_\_\_ and Bob,

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Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

--

Thanks,

**Bob Shea**

Vice Chancellor for Finance and Administration

**University of North Carolina Greensboro**



**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#); [Mike Daly](#)  
**Cc:**  
**Subject:** Re: rpk/UNCG Project Leaders Meeting Follow-up from 1/13/23  
**Date:** Friday, January 13, 2023 2:11:29 PM  
**Attachments:** [Outlook-cs45exho.png](#)

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Thanks, Bob! We'll follow up with you two next week with more specific details on that front so we can make a clear introduction and ask of the UNCG staff.

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**From:** Bob Shea  
**Sent:** Friday, January 13, 2023 11:44 AM  
**To:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Cc:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Subject:** Re: rpk/UNCG Project Leaders Meeting Follow-up from 1/13/23

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## UNCG's Next Steps

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Thanks again,  
Mike Daly

**rpk** GROUP

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Michael Daly | Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

--

Thanks,

**Bob Shea**

Vice Chancellor for Finance and Administration  
**University of North Carolina Greensboro**



**From:** [Mike Daly](#)  
**To:**  
**Cc:** ; [Katie Hagan](#)  
**Subject:** Re: rpk/UNCG Project Leaders Meeting Follow-up from 1/13/23  
**Date:** Monday, January 16, 2023 8:16:44 AM  
**Attachments:** [Outlook-cs45exho.png](#)

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Hi ,

Thanks for sharing all these relevant and valuable documents.

Thanks also for identifying as our liaison to coordinate workshops for faculty leaders related to the work we're producing.

To answer your question, yes an initial meeting of members from all the stakeholder groups is our intent. We are holding 11am-12n and 2pm-3pm on 1/25/23.

Thanks again,  
Mike Daly

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**From:** >  
**Sent:** Sunday, January 15, 2023 11:10 AM  
**To:** Mike Daly <mdaly@rpkgroup.com>;  
**Cc:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** Re: rpk/UNCG Project Leaders Meeting Follow-up from 1/13/23

Hi Mike and Katie,

Per your request, see:

1. Document that came out of the faculty/staff senate open space meeting that proposes a process for program review and potential adjustment to our academic portfolio. I've shared that document with the deans and we have had discussion with no decision on whether this is the right process or committee make up.
2. Summary of provisions of UNCG policy related to the termination of faculty employment due to program elimination or curtailment. These policy provisions can be found in UNCG's "Promotion, Tenure, Academic Freedom, and Due Process Regulations," also attached.
3. Agenda from the Deans Retreat. I also have two subgroups of deans who will move forward on two action items that emerged from the retreat. One is a group of deans who will draft a program review process for consideration and the other is to prioritize actions for more academic efficiencies. I haven't had time to send out the message to the deans to summarize the tasks and list of academic efficiencies they identified but will do so this week and share with you. I've also attached the PPT from the dean retreat.
4. Attached document from a Jan 4th presentation to the deans on sections and section sizes of our gen ed (MAC) curriculum (provided by

I'll confirm with  
but I believe he also shared this with chairs/heads/program directors and undergraduate program directors.

5. Information about our launch of chair/head/program director training (see attached agenda) Our first session/workshop was led by [Kevin Dettmar](#). Professor Dettmar has served as chair

for fifteen years in three departments at two institutions. He makes frequent contributions on being a department chair to the *Chronicle of Higher Education* and is the author of [How to Chair a Department](#), which was released last year by Johns Hopkins University Press (book was provided to all chairs/heads/program directors). He currently serves as Co-Chair of the Theatre Department and Director of the Humanities Studio at Pomona College.

6. I've attached the planned forthcoming chair/head/program director training sessions. I've charged

to develop and facilitate these. We have not had any consistent chair/head training beyond my senior vice provost providing 1:1 budgetary and fiscal training. The rpk training should be integrated within this planned training and the contact with be

Question: Is the one hour kick off to include ALL the following or separate meetings of each group?

- Provost Council, Deans Council, Academic Chairs, and Faculty Senate Executive Committee
  - rpk's current availability is: 1/23, 12n-2pm; 1/24, 10a-11pm and 2p-4p, 1/25, 11am-12n and 1/26, 10am-12

Given that these groups just met, I suggest a large group meeting to include these folks, and to announce that we will use the existing meeting structures for ongoing engagement with you and the various leadership groups. Let me know if that makes sense and, if so, I'll coordinate a meeting. **I suggest two times during the same date because of teaching schedules so all chairs can attend either the morning or afternoon session. Can you provide an afternoon time for 1/25?** The other dates are difficult for me to make due to meetings I cannot adjust.

Best,

On Fri, Jan 13, 2023 at 11:00 AM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:

Hi \_\_\_\_\_ and Bob,

Thank you for spending time with Katie and me this morning. As we design the project communications materials we'd like to ensure congruency with any language used in ongoing academic review activities at UNCG. \_\_\_\_\_, if you can share any artifacts related to the faculty-generated program review process, the summary of program options created by \_\_\_\_\_, the most recent retreat with Vice-Chancellors/Deans, as well as the charge given to Deans and Chairs to review course schedules and general education offerings, that would be appreciated. Further, if there are others in your office that are supporting these (and other) efforts who rpk should coordinate with in these early stages, please let me know.

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#### UNCG's Next Steps

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- Sharing regular meetings schedules with these stakeholder groups along with a list of participants

Thanks again,  
Mike Daly

**rpk** GROUP

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Michael Daly | Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

**From:** [Katie Hagan](#)  
**To:** [Mike Daly](#); [Bob Shea](#);  
**Subject:** Re: Data meeting and communication content request  
**Date:** Tuesday, January 17, 2023 9:46:18 AM

---

thanks so much for making the introduction. we look forward to working with you. Mike and I will send you a note with our availability to connect soon.

before we send a note about the 25th, I think the three of us (me, you, Mike) need to reconnect quickly to ensure we are accurately representing rpk's role in all of your efforts that are underway. Mike and I learned a lot in our review all of the documents you shared, and I don't think we want to have the meeting until the three of us have clarity on roles and responsibilities. If we need to push that meeting out a week to ensure we have a comprehensive project plan ready, I think that is completely fine. We are available to meet with you 1/18 10:30am-1pm, 2-3pm, and 3:30-5pm or 1/19 9-10am and 3-3:30pm.

Thanks,  
Katie

---

**From:**  
**Sent:** Tuesday, January 17, 2023 9:31 AM  
**To:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>; Bob Shea <[bshea@rpkgroup.com](mailto:bshea@rpkgroup.com)>; Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>;

**Subject:** Data meeting and communication content request

Hi Mike and Katie,

I've cc'd [redacted] as I think we need to get you connected with her and her data team asap given the kind of data that her team will need to pull and the development of dashboards. Can you work on connecting?

Also, Mike, can you send me some language for an email invite for the January 25th sessions asap? That meeting hold and message should go out today from me to deans, chairs/heads, and senate executive committee members.

Thanks,

|

**From:** [Katie Hagan](#)  
**To:**  
**Cc:** [Mike Daly](#); [Bob Shea](#);  
**Subject:** Re: Data meeting and communication content request  
**Date:** Tuesday, January 17, 2023 10:01:32 AM

---

Thanks, . Looking forward to connecting tomorrow.

Here is my suggested revision to your update:

rpk GROUP: UNCG has agreed to work with rpk GROUP to support our efforts to respond to our current budgetary situation. They will provide data support, working alongside the UNCG team to create dashboards that can be used to inform decisions about academic and administrative programming (see teaching productivity dashboard as an example: (provide link)). rpk's work will align with ongoing efforts, such as (insert names for trainings and working groups that are already established). A meeting with department chairs/heads/program directors, deans, and the Senate Executive Committee members and rpk will be scheduled soon to discuss scope, timeline, and answer any questions.

---

**From:**  
**Sent:** Tuesday, January 17, 2023 9:51 AM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Cc:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>; Bob Shea  
**Subject:** Re: Data meeting and communication content request

Katie,  
Okay, let's meet tomorrow at 11:00 a.m. I'd like to have at that session too. I'll have set up a zoom for the four of us.

FYI: I have a welcome back message I'm sending today or tomorrow to faculty. This is what I'll note in that message (draft below)

rpk Consulting: To help inform budget decisions, UNCG has agreed to work with rpk Consulting to develop dashboards on data related to academic and administrative programs. Similar to the teaching productivity dashboard (provide link) that all faculty can access, the new dashboards that will be developed are intended to provide access to data so we can have meaningful conversations about where we might reduce costs in addressing our budgetary situation. A meeting with department chairs/heads/program directors, deans, and the Senate Executive Committee members and rpk will be scheduled soon to discuss scope, timeline, and answer any questions.

On Tue, Jan 17, 2023 at 9:46 AM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

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to reconnect quickly to ensure we are accurately representing rpk's role in all of your efforts that are underway. Mike and I learned a lot in our review all of the documents you shared, and I don't think we want to have the meeting until the three of us have clarity on roles and responsibilities. If we need to push that meeting out a week to ensure we have a comprehensive project plan ready, I think that is completely fine. We are available to meet with you 1/18 10:30am-1pm, 2-3pm, and 3:30-5pm or 1/19 9-10am and 3-3:30pm.

Thanks,  
Katie

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**From:**

**Sent:** Tuesday, January 17, 2023 9:31 AM

**To:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>; Bob Shea ; Katie Hagan  
<[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>;

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**From:** [Mike Daly](#)  
**To:** [Katie Hagan](#); [Bob Shea](#)  
**Subject:** rpk/UNCG Project Leaders Meeting

---

rpk GROUP is inviting you to a scheduled Zoom meeting.

Topic: rpk/UNCG Project Leaders Meeting  
Time: Feb 3, 2023 08:30 AM Eastern Time (US and Canada)

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+1 386 347 5053 US  
+1 507 473 4847 US  
+1 564 217 2000 US  
+1 669 444 9171 US  
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+1 689 278 1000 US  
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+1 346 248 7799 US (Houston)  
+1 360 209 5623 US

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**From:** [Mike Daly](#)  
**To:** [Katie Hagan](#); [Bob Shea](#)  
**Subject:** rpk/UNCG Project Leaders Meeting

---

rpk GROUP is inviting you to a scheduled Zoom meeting.

Topic: rpk/UNCG Project Leaders Meeting  
Time: Feb 14, 2023 01:30 PM Eastern Time (US and Canada)

Join Zoom Meeting  
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+1 360 209 5623 US  
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+1 507 473 4847 US  
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+1 669 444 9171 US  
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+1 253 215 8782 US (Tacoma)  
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Find your local number: <https://us02web.zoom.us/u/kep60MmxS8>

**From:** [Mike Daly](#)  
**To:** [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** rpK/UNCG Project Leaders Meeting

---

rpK GROUP is inviting you to a scheduled Zoom meeting.

Topic: rpK/UNCG Project Leaders Meeting  
Time: Feb 27, 2023 10:00 AM Eastern Time (US and Canada)

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<https://us02web.zoom.us/j/85921624848>

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+1 346 248 7799 US (Houston)  
+1 360 209 5623 US  
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+1 507 473 4847 US  
+1 564 217 2000 US

Meeting ID:  
Find your local number: <https://us02web.zoom.us/u/kb9AHHIqV4>

**From:** [Mike Daly](#)  
**To:** [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** rpK/UNCG Project Leaders Meeting

---

rpK GROUP is inviting you to a scheduled Zoom meeting.

Topic: rpK/UNCG Project Leaders Meeting  
Time: Mar 15, 2023 08:30 AM Eastern Time (US and Canada)

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<https://us02web.zoom.us/j/86982332932>

Meeting ID:  
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- +1 689 278 1000 US
- +1 719 359 4580 US

Meeting  
Find your local number: <https://us02web.zoom.us/u/kd72dMqxRp>



**From:** [Mike Daly](#)  
**To:** [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** rpk/UNCG Project Leaders Meeting

---

rpk GROUP is inviting you to a scheduled Zoom meeting.

Topic: rpk/UNCG Project Leaders Meeting  
Time: Mar 27, 2023 08:30 AM Eastern Time (US and Canada)

Join Zoom Meeting  
<https://us02web.zoom.us/j/86898352263>

Meeting ID:  
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Meeting ID:  
Find your local number: <https://us02web.zoom.us/u/kebUs87NGb>

**From:** [Mike Daly](#)  
**To:** [Katie Hagan](#); [Bob Shea](#)  
**Subject:** rpk/UNCG Project Leaders Meetings

---

rpk GROUP is inviting you to a scheduled Zoom meeting.

Topic: rpk/UNCG Project Leaders Meeting  
Time: Apr 26, 2023 12:00 PM Eastern Time (US and Canada)

Join Zoom Meeting  
<https://us02web.zoom.us/j/82359576544>

Meeting ID:  
One tap mobile  
+16468769923,,82359576544# US (New York)  
+16469313860,,82359576544# US

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+1 646 876 9923 US (New York)  
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+1 301 715 8592 US (Washington DC)  
+1 305 224 1968 US  
+1 309 205 3325 US  
+1 312 626 6799 US (Chicago)  
+1 669 900 6833 US (San Jose)  
+1 689 278 1000 US  
+1 719 359 4580 US  
+1 253 205 0468 US  
+1 253 215 8782 US (Tacoma)  
+1 346 248 7799 US (Houston)  
+1 360 209 5623 US  
+1 386 347 5053 US  
+1 507 473 4847 US  
+1 564 217 2000 US  
+1 669 444 9171 US

Meeting ID:  
Find your local number: <https://us02web.zoom.us/u/kddJWPeFqs>

**From:** [Mike Daly](#)  
**To:** [Katie Hagan](#); [Bob Shea](#)  
**Subject:** rpk/UNCG Project Leaders Meeting

---

rpk GROUP is inviting you to a scheduled Zoom meeting.

Topic: rpk/UNCG Project Leaders Meetings  
Time: May 10, 2023 08:30 AM Eastern Time (US and Canada)

Join Zoom Meeting  
<https://us02web.zoom.us/j/87237945741>

Meeting ID:  
One tap mobile  
+16469313860,,87237945741# US  
+16468769923,,87237945741# US (New York)

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+1 646 931 3860 US  
+1 646 876 9923 US (New York)  
+1 312 626 6799 US (Chicago)  
+1 301 715 8592 US (Washington DC)  
+1 305 224 1968 US  
+1 309 205 3325 US  
+1 719 359 4580 US  
+1 253 205 0468 US  
+1 253 215 8782 US (Tacoma)  
+1 346 248 7799 US (Houston)  
+1 360 209 5623 US  
+1 386 347 5053 US  
+1 507 473 4847 US  
+1 564 217 2000 US  
+1 669 444 9171 US  
+1 669 900 6833 US (San Jose)  
+1 689 278 1000 US

Meeting ID:  
Find your local number: <https://us02web.zoom.us/u/knxSLPXeT>

**From:** [Mike Daly](#)  
**To:** [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** rpk/UNCG Project Leaders Meetings

---

rpk GROUP is inviting you to a scheduled Zoom meeting.

Topic: rpk/UNCG Project Leaders Meeting  
Time: May 22, 2023 08:30 PM Eastern Time (US and Canada)

Join Zoom Meeting  
<https://us02web.zoom.us/j/82218344763>

Meeting ID:  
One tap mobile  
+16469313860,,82218344763# US  
+16468769923,,82218344763# US (New York)

Dial by your location  
+1 646 931 3860 US  
+1 646 876 9923 US (New York)  
+1 305 224 1968 US  
+1 309 205 3325 US  
+1 312 626 6799 US (Chicago)  
+1 301 715 8592 US (Washington DC)  
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+1 669 444 9171 US  
+1 669 900 6833 US (San Jose)  
+1 689 278 1000 US  
+1 719 359 4580 US  
+1 253 205 0468 US  
+1 253 215 8782 US (Tacoma)  
+1 346 248 7799 US (Houston)  
+1 360 209 5623 US  
+1 386 347 5053 US  
+1 507 473 4847 US

Meeting ID:  
Find your local number: <https://us02web.zoom.us/u/kels425SWZ>

**From:** [Mike Daly](#)  
**To:** [Katie Hagan](#); [Bob Shea](#)  
**Subject:** rpk/UNCG Project Leaders Meetings

---

rpk GROUP is inviting you to a scheduled Zoom meeting.

Topic: rpk/UNCG Project Leaders Meeting  
Time: Jun 8, 2023 02:00 PM Eastern Time (US and Canada)

Join Zoom Meeting  
<https://us02web.zoom.us/j/81164720527>

Meeting ID:  
One tap mobile  
+16469313860,,81164720527# US  
+16468769923,,81164720527# US (New York)

Dial by your location  
+1 646 931 3860 US  
+1 646 876 9923 US (New York)  
+1 305 224 1968 US  
+1 309 205 3325 US  
+1 312 626 6799 US (Chicago)  
+1 301 715 8592 US (Washington DC)  
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+1 346 248 7799 US (Houston)  
+1 360 209 5623 US  
+1 386 347 5053 US  
+1 507 473 4847 US  
+1 564 217 2000 US  
+1 669 444 9171 US  
+1 669 900 6833 US (San Jose)  
+1 689 278 1000 US  
+1 719 359 4580 US

Meeting ID:  
Find your local number: <https://us02web.zoom.us/u/keEWUIOt2>

**From:** [Mike Daly](#)  
**To:** [Bob Shea](#);  
**Cc:** [Katie Hagan](#)  
**Subject:** rpK/UNCG: Project Leaders Meetings

---

rpK GROUP is inviting you to a scheduled Zoom meeting.

Topic: rpK/UNCG Project Leaders Meeting  
Time: Jun 26, 2023 09:00 AM Eastern Time (US and Canada)

Join Zoom Meeting  
<https://us02web.zoom.us/j/88150365607>

Meeting ID:  
One tap mobile  
+16469313860,,88150365607# US  
+16468769923,,88150365607# US (New York)

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+1 646 876 9923 US (New York)  
+1 305 224 1968 US  
+1 309 205 3325 US  
+1 312 626 6799 US (Chicago)  
+1 301 715 8592 US (Washington DC)  
+1 386 347 5053 US  
+1 507 473 4847 US  
+1 564 217 2000 US  
+1 669 444 9171 US  
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+1 719 359 4580 US  
+1 253 205 0468 US  
+1 253 215 8782 US (Tacoma)  
+1 346 248 7799 US (Houston)  
+1 360 209 5623 US

Meeting ID:  
Find your local number: <https://us02web.zoom.us/u/kdvcYuH81O>

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** rpk/UNCG - Weekly Project Update  
**Date:** Thursday, January 26, 2023 12:26:55 PM  
**Attachments:** [Outlook-gvvlwk0i.png](#)  
[UNCG Weekly Project Update 2023.01.26.pdf](#)

---

Hello and Bob,

Attached please find an update on the project's progress over the last week. We will share this update with you weekly. I invite your feedback in terms of any adding additional information that you may find useful.

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

UNCG



# UNCG & rpk GROUP

## Status Report: January 26, 2023

rpk GROUP  
from mission to market

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# Project Overview: January 19 - 26

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>Met with [redacted] and [redacted] to review project approach and discuss approaches to data collection, validation, and utilization.</li> </ul>	<ul style="list-style-type: none"> <li>Facilitating project introduction to stakeholder groups on 1/31/23</li> <li>Meeting with Institutional Research core team on 2/3/23</li> <li>Developing data-related project timeline by 2/10/23</li> <li>Scheduling meeting with Dean's working group</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>Continued sharing with rpk the current academic data being generated and reviewed by various UNCG groups.</li> </ul>	<ul style="list-style-type: none"> <li>Hosting project introduction meeting (Zoom) for stakeholder groups on 1/31/23</li> </ul>

Key

Complete

On Track

At Risk

Off Track

Not Started

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# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			On Track	On Track	On Track																										
Data Collection & Verification						On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track																	
Dashboard 1: TBD												On Track	On Track	On Track	On Track	On Track	On Track														
Dashboard 2: TBD																On Track	On Track	On Track	On Track	On Track	On Track										
Faculty Workshops										On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	

Key	Complete	On Track	At Risk	Off Track	Not Started
-----	----------	----------	---------	-----------	-------------

# Timeline – Administrative Services Review

Phase	January					February				March				April				May				June				July						
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31	
Kick-off and Data Discovery			On Track	On Track	On Track																											
Data Collection & Verification						On Track	On Track	On Track	On Track																							
Stakeholder Interview & Survey										On Track	On Track	On Track	On Track	On Track																		
Final Report & Recommendations																On Track	On Track	On Track	On Track	On Track	On Track											

Key	Complete	On Track	At Risk	Off Track	Not Started
-----	----------	----------	---------	-----------	-------------



# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Status Meeting (monthly)	[REDACTED] Rick Staisloff	TBD	To be scheduled
Project Leaders Meeting (bi-weekly)	[REDACTED], Steve, Katie, and Mike	Bi-weekly starting 2/3/23	-
Project Kick-off Meeting	Project Leaders and stakeholder groups	1/31/23 at 9am and 1pm	-
Data Governance Meetings	rpk and UNCG Data owners	2/3/23	rpk sharing draft data templates and data request list
Working Group Meeting	rpk and UNCG working groups	TBD	To be scheduled
Stakeholder Updates	Executive Steering Committee, Provost's Council, Dean's Council, Academic Department Chairs, and Faculty Senate Executive Committee	TBD; based on regularly scheduled meetings	To be scheduled

# Data Collection Status

Status	File/Description	Notes/Next Steps
Not Started	Course data	Sharing data templates with Institutional Research on 1/27
Not Started	Academic program list	
Not Started	Academic program data	
Not Started	Personnel data	
Not Started	Financial data	

Key	Complete	On Track	At Risk	Off Track	Not Started



Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#)  
**Subject:** Meeting to discuss financial analysis & admin services review  
**Date:** Thursday, January 26, 2023 3:59:00 PM

---

Hi Bob,

Hope you're having a good week. I'm reaching out to get some time with you in the next week or two to discuss a couple of things. The first is that we need to determine our source for the academic financial analysis, and the second is that I'd like to outline our approach for the administrative services review. I don't think our 30-minute biweekly meetings will suffice to iron out all the details, and I was not sure if you wanted anyone else included in the conversation. Let me know your thoughts, and how best to go about finding some time in early February.

Best,  
Katie

**rpk** GROUP  
from mission to market

Katie Hagan | Principal | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490

**From:** [Bob Shea](#)  
**To:** [Katie Hagan](#);  
**Subject:** Re: Meeting to discuss financial analysis & admin services review  
**Date:** Thursday, January 26, 2023 4:05:47 PM

---

Katie,

will coordinate times with you. 60-90 minutes?

On Thu, Jan 26, 2023 at 3:59 PM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Hi Bob,

Hope you're having a good week. I'm reaching out to get some time with you in the next week or two to discuss a couple of things. The first is that we need to determine our source for the academic financial analysis, and the second is that I'd like to outline our approach for the administrative services review. I don't think our 30-minute biweekly meetings will suffice to iron out all the details, and I was not sure if you wanted anyone else included in the conversation. Let me know your thoughts, and how best to go about finding some time in early February.

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Katie

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from mission to market

Katie Hagan | Principal | [rpK GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com) | 757-589-0490

--

Thanks,

**Bob Shea**  
Vice Chancellor for Finance and Administration  
**University of North Carolina Greensboro**





**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#);  
**Subject:** Re: Meeting to discuss financial analysis & admin services review  
**Date:** Thursday, January 26, 2023 4:07:19 PM

---

Thanks, Bob.                      Thanks in advance, and an hour would be great.

Best,  
Katie

---

**From:** Bob Shea  
**Sent:** Thursday, January 26, 2023 4:05 PM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>;  
**Subject:** Re: Meeting to discuss financial analysis & admin services review

Katie,

will coordinate times with you. 60-90 minutes?

On Thu, Jan 26, 2023 at 3:59 PM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Hi Bob,

Hope you're having a good week. I'm reaching out to get some time with you in the next week or two to discuss a couple of things. The first is that we need to determine our source for the academic financial analysis, and the second is that I'd like to outline our approach for the administrative services review. I don't think our 30-minute biweekly meetings will suffice to iron out all the details, and I was not sure if you wanted anyone else included in the conversation. Let me know your thoughts, and how best to go about finding some time in early February.

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Katie Hagan | Principal | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com) | 757-589-0490

--

Thanks,

**Bob Shea**

Vice Chancellor for Finance and Administration

**University of North Carolina Greensboro**



**From:**  
**To:** [Katie Hagan](#)  
**Cc:** [Bob Shea](#)  
**Subject:** Re: Meeting to discuss financial analysis & admin services review  
**Date:** Thursday, January 26, 2023 4:24:16 PM

---

Hey Katie,

I'm happy to assist. Bob has the following availability, if you would like me to calendar the meeting, let me know:

2/2 11:00-12:30 pm  
2/3 9:00-10:30 am, 1:30-3:00 pm  
2/6 9:30-11:00 am  
2/8 9:30-11:00 am

Thanks so much!

On Thu, Jan 26, 2023 at 4:07 PM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Thanks, Bob. Thanks in advance, and an hour would be great.

Best,  
Katie

---

**From:** Bob Shea  
**Sent:** Thursday, January 26, 2023 4:05 PM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>;  
**Subject:** Re: Meeting to discuss financial analysis & admin services review

Katie,

will coordinate times with you. 60-90 minutes?

On Thu, Jan 26, 2023 at 3:59 PM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Hi Bob,

Hope you're having a good week. I'm reaching out to get some time with you in the next week or two to discuss a couple of things. The first is that we need to determine our source for the academic financial analysis, and the second is that I'd like to outline our approach for the administrative services review. I don't think our 30-minute biweekly meetings will suffice to iron out all the details, and I was not sure if you wanted anyone else included in the conversation. Let me know your thoughts, and how best to go about finding some time in early February.

Best,  
Katie

**rpk** GROUP  
from mission to market

Katie Hagan | Principal | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com) | 757-589-0490

--

Thanks,

**Bob Shea**

Vice Chancellor for Finance and Administration

**University of North Carolina Greensboro**



--

Warmest regards,

1202 Spring Garden Street

Greensboro, NC 27402



"In order to succeed, we must first believe that we can."

Nikos Kazantzakis

**From:** [Katie Hagan](#)  
**To:** [Raven Moody](#); [Bob Shea](#)  
**Subject:** Bob/rpk - Finance & Admin Services Planning

---

---

Microsoft Teams meeting

Join on your computer, mobile app or room device

Click here to join the meeting <[https://teams.microsoft.com/l/meetup-join/19%3ameeting\\_YzVkNzYzY2MtYjE3Yi00NzYzLWEwZWYtYWYwOWZiZmEwODcy%40thread.v2/0?context=%7b%22Tid%22%3a%2271045f2d-0270-418b-b5e8-88b710e0a905%22%2c%22Oid%22%3a%22313cca71-9a15-464f-80b4-7553d31e9d96%22%7d](https://teams.microsoft.com/l/meetup-join/19%3ameeting_YzVkNzYzY2MtYjE3Yi00NzYzLWEwZWYtYWYwOWZiZmEwODcy%40thread.v2/0?context=%7b%22Tid%22%3a%2271045f2d-0270-418b-b5e8-88b710e0a905%22%2c%22Oid%22%3a%22313cca71-9a15-464f-80b4-7553d31e9d96%22%7d)>

Meeting ID:  
Passcode: taBasX

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---

**From:** [Katie Hagan](#)  
**To:**  
**Cc:** [Bob Shea](#)  
**Subject:** Re: Meeting to discuss financial analysis & admin services review  
**Date:** Thursday, January 26, 2023 6:23:15 PM

---

Thank you! Just sent an invite for 2/2.

Best,  
Katie

---

**From:**  
**Sent:** Thursday, January 26, 2023 4:24 PM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Cc:** Bob Shea  
**Subject:** Re: Meeting to discuss financial analysis & admin services review

Hey Katie,

I'm happy to assist. Bob has the following availability, if you would like me to calendar the meeting, let me know:

2/2 11:00-12:30 pm  
2/3 9:00-10:30 am, 1:30-3:00 pm  
2/6 9:30-11:00 am  
2/8 9:30-11:00 am

Thanks so much!

On Thu, Jan 26, 2023 at 4:07 PM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Thanks, Bob. Thanks in advance, and an hour would be great.

Best,  
Katie

---

**From:** Bob Shea >  
**Sent:** Thursday, January 26, 2023 4:05 PM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>;  
**Subject:** Re: Meeting to discuss financial analysis & admin services review

Katie,

will coordinate times with you. 60-90 minutes?

On Thu, Jan 26, 2023 at 3:59 PM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Hi Bob,

Hope you're having a good week. I'm reaching out to get some time with you in the next week or two to discuss a couple of things. The first is that we need to determine our source for the academic financial analysis, and the second is that I'd like to outline our approach for the administrative services review. I don't think our 30-minute biweekly meetings will suffice to iron out all the details, and I was not sure if you wanted anyone else included in the conversation. Let me know your thoughts, and how best to go about finding some time in early February.

Best,  
Katie

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626C Admiral Drive, Suite 511, Annapolis, MD 21401

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com) | 757-589-0490

--

Thanks,

**Bob Shea**

Vice Chancellor for Finance and Administration

**University of North Carolina Greensboro**



--

Warmest regards,

1202 Spring Garden Street

Greensboro, NC 27402



"In order to succeed, we must first believe that we can."

Nikos Kazantzakis



**From:** [Mike Daly](#)  
**To:** [Katie Hagan](#); [Bob Shea](#)  
**Subject:** rpk/UNCG Project Leaders Meeting

---

rpk GROUP is inviting you to a scheduled Zoom meeting.

Topic: rpk/UNCG Project Leaders Meeting  
Time: Feb 14, 2023 01:30 PM Eastern Time (US and Canada)

Join Zoom Meeting  
<https://us02web.zoom.us/j/82516492407>

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+1 646 876 9923 US (New York)  
+1 305 224 1968 US  
+1 309 205 3325 US  
+1 312 626 6799 US (Chicago)  
+1 301 715 8592 US (Washington DC)  
+1 360 209 5623 US  
+1 386 347 5053 US  
+1 507 473 4847 US  
+1 564 217 2000 US  
+1 669 444 9171 US  
+1 669 900 6833 US (San Jose)  
+1 689 278 1000 US  
+1 719 359 4580 US  
+1 253 205 0468 US  
+1 253 215 8782 US (Tacoma)  
+1 346 248 7799 US (Houston)

Meeting ID:  
Find your local number: <https://us02web.zoom.us/j/82516492407>

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#)  
**Cc:** [Raven Moody](#)  
**Subject:** Background for Thursday Meeting  
**Date:** Monday, January 30, 2023 8:50:59 PM  
**Attachments:** [Example Finance Data Request.xlsx](#)

---

Hi Bob,

We are looking forward to connecting this week. As I mentioned last week, the key agenda items are confirming the data source and high-level approach for the financial analysis, as well as discussing the administrative services review.

I know some other folks are invited to the meeting on Thursday, and I assume it's due to their connection to financial data. If so, we'll plan to start with the academic financial analysis on the agenda. We'll discuss your goals for the analysis, existing efforts that are related to calculating net revenue or financial contribution of academic units, and outline the best path forward. An example file is attached that demonstrates the data we are looking to collect or ultimately connect into with the dashboard.

For the administrative services review component, we'd like to review organizational charts and identify key personnel for initial interviews to begin to develop an understanding of priorities and ideas for administrative efficiency improvements ([org charts available on the website](#) seem outdated and incomplete, so we'll need to collect current versions). After these initial interviews/conversations, we'll confer with you and \_\_\_\_\_ to outline a path forward, which would include a survey of faculty and staff for additional ideas and opportunities, as well as deeper dives into the functions that are highest priority or are surfaced as having the most potential for savings impact.

Please let me know if this plan works for you, or if you have any questions before Thursday.

Best,  
Katie

**rpK** GROUP  
from mission to market

Katie Hagan | Principal | [rpK GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490



**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Background for Thursday Meeting  
**Date:** Tuesday, January 31, 2023 4:55:07 PM

---

Thank you,

---

**From:**  
**Sent:** Tuesday, January 31, 2023 4:54 PM  
**To:** Bob Shea <r\_shea@uncg.edu>  
**Cc:** Katie Hagan <khagan@rpkgroup.com>; Mike Daly <mdaly@rpkgroup.com>  
**Subject:** Re: Background for Thursday Meeting

Hi All,

Attached are the ORG Charts for Campus Enterprises, I am still trying to retrieve detailed ones from Academics.

Thanks.

On Tue, Jan 31, 2023 at 3:15 PM wrote:

Good Afternoon,

Per Bob's email, I am attaching ORG Charts for all of Finance and Administration minus Campus Enterprises, I am still waiting on theirs. Also, I am attaching a general ORG chart for Academic Affairs, I have requested that they drill down their ORG chart to include position numbers and titles. I hope to have that soon, and will forward.

If you all have any questions at all, please don't hesitate to reach out to me, I am more than happy to assist.

Have a great afternoon.

On Tue, Jan 31, 2023 at 10:15 AM Bob Shea wrote:

Yes, the general plan looks good.

Yes, I've invited

Between the three of us, we should be able to answer any detailed questions you might have. has 22 years experience in the UNC system and knows the idiosyncrasies of the system inside and out. is the former Beth Hardin and was the

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Thanks,

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Vice Chancellor for Finance and Administration  
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Warmest regards,

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**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#); [Mike Daly](#)  
**Subject:** Re: Background for Thursday Meeting  
**Date:** Tuesday, January 31, 2023 4:56:03 PM

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**Sent:** Tuesday, January 31, 2023 10:14 AM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>; >; Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
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--

Thanks,

**Bob Shea**

Vice Chancellor for Finance and Administration  
**University of North Carolina Greensboro**



**From:** [Katie Hagan](#)  
**To:**  
**Cc:** [Bob Shea](#); [Mike Daly](#)  
**Subject:** Re: Background for Thursday Meeting  
**Date:** Wednesday, February 1, 2023 6:02:56 PM

---

Thank you so much!

---

**From:**  
**Sent:** Wednesday, February 1, 2023 5:03 PM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Cc:** Bob Shea ; Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Subject:** Re: Background for Thursday Meeting

Hi All,

Enrollment Management for the final ones today.

Have a pleasant evening!

On Wed, Feb 1, 2023 at 4:08 PM

wrote:

Hi All,

I was able to get Student Affairs as well, they are attached. Still waiting on others.

On Wed, Feb 1, 2023 at 3:33 PM

wrote:

Good Afternoon,

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**From:** [Mike Daly](#)  
**To:** [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** rpk/UNCG Weekly Update and Agenda for 2/3 Project Leaders meeting  
**Date:** Wednesday, February 1, 2023 8:10:07 PM  
**Attachments:** [Outlook-yu3xgrsk.png](#)  
[UNCG Weekly Project Update 2023.02.02.pdf](#)

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Hello            and Bob,

Attached please find the weekly project update.

Katie and I are looking forward to touching base with you both tomorrow. Here's our standing agenda for these meetings, with other items to be added as necessary as the project progresses:

- Feedback on project and engagements
- Academic Data/Dashboards
- Administrative Services Review
- Project Communication
- Next Steps

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209



UNCG



# UNCG & rpk GROUP

## Status Report: February 2, 2023

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# Project Overview: January 27 - February 2

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>Met with [redacted] to review current course data on 1/27</li> <li>Facilitated two project introductions to representative stakeholders on 1/31</li> <li>Attended Academic Council meeting for follow-up Q &amp; A on 2/1/</li> <li>Katie met with Dean's working group on 2/1/</li> <li>Shared draft language for project website; launched project feedback form</li> <li>Provided data templates and data request lists to IR team ahead of 2/3 meeting</li> </ul>	<ul style="list-style-type: none"> <li>Project leaders meeting on 2/3</li> <li>Meeting with Institutional Research core team on 2/3</li> <li>Providing project introduction to Chancellor's Council on 2/6</li> <li>Meeting with [redacted] and dashboard developers on 2/10</li> <li>Developing data-related project timeline by 2/10</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>Shared data in support of Administrative Services Review</li> <li>Facilitated two project introductions to representative stakeholders on 1/31</li> </ul>	<ul style="list-style-type: none"> <li>Chancellor launching Fiscal Sustainability committee – will need to identify how rpk's work fits into this group</li> </ul>

Key

Complete

On Track

At Risk

Off Track

Not Started

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# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May				June				July					
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Not Started																									
Data Collection & Verification						Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started															
Dashboard 1: TBD													Not Started	Not Started	Not Started	Not Started	Not Started														
Dashboard 2: TBD																	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started									
Faculty Workshops											Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May				June				July						
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31	
Kick-off and Data Discovery			Complete	Complete	Complete	On Track																										
Data Collection & Verification						On Track	On Track	On Track	On Track																							
Stakeholder Interview & Survey										On Track	On Track	On Track	On Track	On Track																		
Final Report & Recommendations																On Track	On Track	On Track	On Track	On Track	On Track											

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Status Meeting (monthly)	[REDACTED] Rick Staisloff	TBD	To be scheduled
Project Leaders Meeting (bi-weekly)	[REDACTED], Bob, Katie, and Mike	Bi-weekly starting 2/3	Review agenda
Chancellor's Council Meeting	Rick Staisloff, Mike, and Council	2/6, 1:30p	-
Academic Data Meeting	rpk and UNCG IR	2/3, 2pm	rpk shared draft data templates and data request list
Academic Dashboard Meeting	rpk and UNCG Dashboard Team	2/10, 1pm	-
Stakeholder Updates	Executive Steering Committee, Provost's Council, Dean's Council, Academic Department Chairs, and Faculty Senate Executive Committee	based on regularly scheduled meetings (Faculty Senate Executive, 2/6; Provost's Council, 2/15; Department Chairs, 2/16)	Scheduled and invites shared with rpk

# Data Collection Status

Status	File/Description	Notes
Not Started	Course data	Shared templates with Institutional Research on 1/27, reviewing during 2/3 meeting
Not Started	Academic program list	
Not Started	Academic program data	
Not Started	Instructor data	
Started	Administrative Services Review	Organizational charts and supporting documents shared

Key	Complete	On Track	At Risk	Off Track	Not Started

# Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)



**From:** [Katie Hagan](#)  
**To:**  
**Cc:** [Bob Shea](#); [Mike Daly](#)  
**Subject:** Re: Background for Thursday Meeting  
**Date:** Thursday, February 2, 2023 7:13:52 AM

---

Hi

Thanks so much for getting all of these to us so quickly. I reviewed all of them yesterday and everything looks great, but the advancement one is difficult to read/follow given the color distortion that looks like happened when it was scanned in (the darker colored boxes require a significant zoom in to read). If it's possible for someone in advancement to update the digital version at some point in the coming weeks, that would be much appreciated. Also, where does advancement report? To the

Thank you,  
Katie

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**Cc:** [Bob Shea](#)  
**Subject:** Re: rpk/UNCG Weekly Update and Agenda for 2/3 Project Leaders meeting  
**Date:** Thursday, February 2, 2023 12:37:51 PM  
**Attachments:** [Outlook-yu3xgrsk.png](#)

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Thanks, . We'll definitely need to know more about the vision from the and in terms of how we can support the effort. Here is the language related to administrative services from our scope (in our budget it's a lot fewer hours of our time relative to the academic support, so if we need to rescope anything it would be good to do so now).

### ***Administrative Services Review***

*UNCG intends to review both academic and administrative services as it pursues good stewardship of all resources and the move toward a sustainable business model. The administrative services review would identify possible areas of cost savings and service improvement outside of academics. To achieve this, rpk will do the following:*

- *Conduct up to 25 individual/group interviews to understand existing service delivery and opportunities for improvement.*
- *Support UNCG in the creation and analysis of a customer service survey of faculty and staff to solicit feedback on service levels and pain points.*
- *Review UNCG's organization structure and other HR data to assess staffing levels and organizational structure changes that may yield efficiencies.*

*At the conclusion of the work above, rpk will present the findings to the project leads, and will recommend areas that reflect the highest opportunity for savings or service improvement. UNCG will select up to three units for deeper reviews and action plan development in partnership with unit leadership and staff. This work will serve as a model for other administrative units to complete their own deeper self-assessments and action plans.*

---

**From:**  
**Sent:** Thursday, February 2, 2023 12:28 PM  
**To:** Mike Daly <mdaly@rpkgroup.com>  
**Cc:** Bob Shea ; Katie Hagan <khagan@rpkgroup.com>  
**Subject:** Re: rpk/UNCG Weekly Update and Agenda for 2/3 Project Leaders meeting

Oops, sent before I pasted the message:

Sent on behalf of :

Dear ,

UNCG is at an inflection point and we must work together to

innovate and reinvent ourselves. As part of this effort, I invite you to serve on a campus task force on financial sustainability. Your university-wide perspective is much admired and appreciated. \_\_\_\_\_ has endorsed your participation.

The charge of this Task Force is to identify long-term and near-term strategies for fiscal sustainability; develop informed recommendations to make the university more efficient and cost-effective (e.g. **non-academic** reductions, reorganizations, reinvestments, reprioritizations, and innovations).

The Task Force should consult with key stakeholders on campus. Data from rpk Consulting, and the various Open Space forums will be provided as it becomes available. To be clear, this Task Force is not responsible for and should not examine the university's academic program portfolio (which is being reviewed through a different set of processes). This Task Force's primary focus is to examine operations in both administrative and academic units.

A report is due to the Chancellor by May 19, 2023.

\_\_\_\_\_ will chair this committee. Please let \_\_\_\_\_ know if you accept this role or have any questions. Your prompt response is appreciated. We would like to announce this Task Force by Friday.

Please hold Friday, February 10, 2-3 pm, for the launch meeting.

Warm regards,

\*\*\*\*

On Thu, Feb 2, 2023 at 12:28 PM

\_\_\_\_\_ wrote:

Thanks all,  
I've shared the timeline with the \_\_\_\_\_ and she notes the timeline for administrative review is not aligned with what she and \_\_\_\_\_ has charged the administrative task force of financial sustainability (see example below). I know you will be at the session on Monday at Chancellor Council and the question of data from the administrative side may come up. Just a FYI.

Also, waiting to get feedback from  
Mike drafted (thank you) and I edited.

on the website content that

Sample invite below to

(who represents my office) on the task force:

On Thu, Feb 2, 2023 at 8:30 AM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:

Hello and Bob,

Attached please find the weekly project update.

Katie and I are looking forward to touching base with you both tomorrow. Here's our standing agenda for these meetings, with other items to be added as necessary as the project progresses:

- Feedback on project and engagements
- Academic Data/Dashboards
- Administrative Services Review
- Project Communication
- Next Steps

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Associate | [rpk GROUP](https://www.rpkgroup.com)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

**From:** [Katie Hagan](#)  
**To:**  
**Cc:** [Bob Shea](#); [Mike Daly](#)  
**Subject:** Re: Background for Thursday Meeting  
**Date:** Thursday, February 2, 2023 3:11:53 PM

---

Thak you so much!

---

**From:**  
**Sent:** Thursday, February 2, 2023 8:01 AM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Cc:** Bob Shea ; Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Subject:** Re: Background for Thursday Meeting

Hi Katie,

No problem, I wasn't sure how soon you needed them all, I was trying to get them to you as quickly as possible. I will definitely reach out to my equivalent in advancement to request a digital copy.

Advancement reports to , and all VC's report to the Chancellor. Hope this helps.

I am working on obtaining ORG charts for the Chancellor's office as well.

Let me know if you have other questions.

On Thu, Feb 2, 2023 at 7:13 AM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Hi

Thanks so much for getting all of these to us so quickly. I reviewed all of them yesterday and everything looks great, but the advancement one is difficult to read/follow given the color distortion that looks like happened when it was scanned in (the darker colored boxes require a significant zoom in to read). If it's possible for someone in advancement to update the digital version at some point in the coming weeks, that would be much appreciated.

Also, where does advancement report? To the ?

Thank you,  
Katie

---

**From:**  
**Sent:** Wednesday, February 1, 2023 3:33 PM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Cc:** Bob Shea ; Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>

**Subject:** Re: Background for Thursday Meeting

Good Afternoon,

Here are a few more, I am still collecting. University Advancement I edited myself using their website and some data that Bob provided me a bit ago.

On Tue, Jan 31, 2023 at 4:56 PM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Thanks so much for this additional information, and for the Bain reports, Bob! Looking forward to digging in more on Thursday.

Best,  
Katie

---

**From:** Bob Shea >  
**Sent:** Tuesday, January 31, 2023 10:14 AM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>;  
<[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Subject:** Re: Background for Thursday Meeting

Mike Daly

Yes, the general plan looks good.

Yes, I've invited

. Between the three of us, we should be able to answer any detailed questions you might have. has 22 years experience in the UNC system and knows the idiosyncrasies of the system inside and out. is the former Beth Hardin and was the before I lured him here. He has about a decade's worth of UNC system knowledge. Oh by the way, I heard you are considering Sharon Bell from App. She is no longer at App for the same reason left App, Beth Hardin left UNCC, Nick Long left Central Michigan, Harland Sands left Louisville and Cleveland State, and I left . (more in private but higher ed has a structural problem in how it hires CEO's!). I've known Sharon for 15 years since our time together in RI where she was the controller at URI. recruited her to App from URI. Sharon, and I all worked together in RI. Sharon is a top tier human and finance pro.

I'll have get you updated org charts. Most **everyone** here believes we have no fat to cut. I believe otherwise. In some places we have nowhere to cut, but in other spots we have opportunities. While at , we operated in a much leaner way and from my time consulting at NACUBO, I know most publics run way more inefficiently than private ones. Our Faculty, EHRA and SHRA work rules make change challenging. Culture change is our biggest hurdle and that is from the chancellor's council all the way down to our most junior supervisors.



I've already begun conversations to consider outsourcing custodial work. We already outsource food services and bookstore. Like many publics in NC we have two facilities staffs; one in Facilities and the other in Housing. Makes NO sense but it is a historical artifact of inefficient structures when resources were not constrained. I'm having a conversation this week with the UNC system chief of staff and VP for Risk and Public Safety on the possibility of centralizing/merging police dispatch staffs. Many system schools are having recruiting/retention problems for dispatchers and police. Centralization makes sense here. We have 211 secretarial positions. I think we could cut that number in half saving about 5 million annually. I think we could save utility expense if the system negotiated electricity for us; currently we all do that independently. NC has some interesting utility regulation which gives utilities near monopoly power. I owe you that cost reduction spreadsheet that \_\_\_\_\_ and I have been using to discuss/influence/persuade \_\_\_\_\_. Have you seen the Bain study that UNC CH had done a dozen or so years ago? Many good ideas in there. I found the summary, I'll track down the full report.

### **Key Interviews**

I'm looking forward to working together and rpk helping us break the cultural dynamic of organizational inertia here. Not sure \_\_\_\_\_ has told you this, but we fully anticipate some sort of vote of no confidence here during your engagement with us.

On Tue, Jan 31, 2023 at 8:00 AM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Hi Bob,

We are looking forward to connecting this week. As I mentioned last week, the key agenda items are confirming the data source and high-level approach for the financial analysis, as well as discussing the administrative services review.

I know some other folks are invited to the meeting on Thursday, and I assume it's due to their connection to financial data. If so, we'll plan to start with the academic financial analysis on the agenda. We'll discuss your goals for the analysis, existing efforts that are related to calculating net revenue or financial contribution of academic units, and outline the best path forward. An example file is attached that demonstrates the data we are looking to collect or ultimately connect into with the dashboard.

For the administrative services review component, we'd like to review organizational charts and identify key personnel for initial interviews to begin to develop an understanding of priorities and ideas for administrative efficiency improvements ([org charts available on the website](#) seem outdated and incomplete, so we'll need to collect current versions). After these initial interviews/conversations, we'll confer with you and to outline a path forward, which would include a survey of faculty and staff for additional ideas and opportunities, as well as deeper dives into the functions that are highest priority or are surfaced as having the most potential for savings impact.

Please let me know if this plan works for you, or if you have any questions before Thursday.

Best,  
Katie

**rp**k GROUP  
from mission to market

Katie Hagan | Principal | [rp](#)k GROUP

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com) | 757-589-0490

--  
Thanks,

**Bob Shea**  
Vice Chancellor for Finance and Administration  
**University of North Carolina Greensboro**



--  
Warmest regards,

1202 Spring Garden Street

Greensboro, NC 27402



"In order to succeed, we must first believe that we can."

Nikos Kazantzakis

--

Warmest regards,

1202 Spring Garden Street

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"In order to succeed, we must first believe that we can."

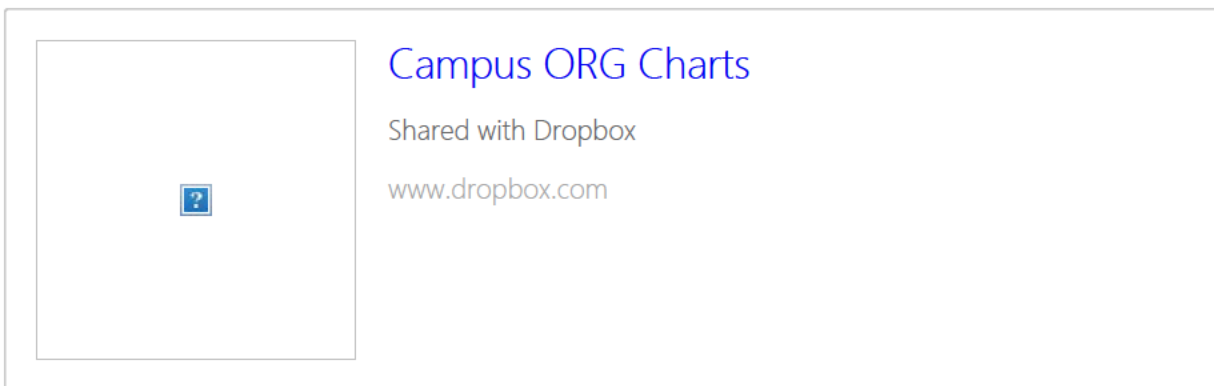
Nikos Kazantzakis

**From:** [Katie Hagan](#)  
**To:**  
**Cc:** [Bob Shea](#); [Mike Daly](#)  
**Subject:** Re: Background for Thursday Meeting  
**Date:** Thursday, February 2, 2023 5:20:22 PM

---

Thanks so much, I put this all in a Dropbox folder if it's easier for you to drop them in as you receive them:

<https://www.dropbox.com/scl/fo/dy21wpinmut1uyxkr9fho/h?dl=0&rlkey=pfjpkba65x776fgjwn1p91cp0>



---

**From:**  
**Sent:** Thursday, February 2, 2023 3:56 PM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Cc:** Bob Shea ; Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Subject:** Re: Background for Thursday Meeting

Hey Katie,

I have received more detailed charts today. I have organized everything according to Division, if that makes sense, with some subfolders and files. So what I have sent you is included in this file as well, just organized within the proper folder.

I will have more in the coming days. Also, University Advancements Org chart has been updated.

On Thu, Feb 2, 2023 at 3:11 PM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Thak you so much!

---

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Hope this helps.

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Let me know if you have other questions.

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Please let me know if this plan works for you, or if you have any questions before Thursday.

Best,  
Katie

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from mission to market

Katie Hagan | Principal | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com) | 757-589-0490

--

Thanks,

**Bob Shea**

Vice Chancellor for Finance and Administration  
**University of North Carolina Greensboro**



--

Warmest regards,

1202 Spring Garden Street  
254 Mossman  
Greensboro, NC 27402





"In order to succeed, we must first believe that we can."  
Nikos Kazantzakis

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Warmest regards,

1202 Spring Garden Street

Greensboro, NC 27402



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Nikos Kazantzakis

**From:** [Katie Hagan](#)  
**To:**  
**Cc:** [Bob Shea](#); [Mike Daly](#)  
**Subject:** Org Charts - Language to Share  
**Date:** Friday, February 3, 2023 11:45:29 AM

---

Hi Bob and ,

Thanks so much for the time this morning. As discussed, below are a few sentences that you are welcome to revise and share as needed to explain the request for org charts.

*rpk GROUP, as part of their consulting engagement with UNCG, is requesting organizational charts from every department - academic and administrative. They use the charts as one of many ways to develop an understanding of our institution. Human Resources maintains all organizational charts on [their website](#), but many are out-of-date given changes in recent years, so this effort will also support an updating of that source of information.*

Thanks,  
Katie

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from mission to market

Katie Hagan | Principal | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490

**From:** [Katie Hagan](#)  
**To:** ; [Mike Daly](#)  
**Cc:** [Bob Shea](#)  
**Subject:** Re: Administrative efficiencies  
**Date:** Friday, February 3, 2023 1:10:09 PM  
**Attachments:** [image.png](#)

---

Thanks, !

---

**From:**  
**Sent:** Friday, February 3, 2023 10:30 AM  
**To:** Katie Hagan <khagan@rpkgroup.com>; Mike Daly <mdaly@rpkgroup.com>  
**Cc:** Bob Shea ; Debbie Storrs <dastorrs@uncg.edu>  
**Subject:** Administrative efficiencies

Dear Katie and Mike,  
This is a list of inefficiencies that Arts & Sciences chairs expressed frustration with. I shared with the leadership team last January 2022. You'll note some responses from EM in this file. Hope this also helps.  
Have a great weekend,

--

UNC Greensboro

201 Mossman Building  
Greensboro, NC 27412



**UNC GREENSBORO**

*Find your way here*

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#); [Mike Daly](#); [Raven Moody](#)  
**Subject:** Re: Most Recent Files Discussed This Morning  
**Date:** Friday, February 3, 2023 1:24:17 PM

---

Thanks, Bob!

---

**From:** Bob Shea  
**Sent:** Friday, February 3, 2023 9:39 AM  
**To:** Katie Hagan <khagan@rpkgroup.com>; Mike Daly <mdaly@rpkgroup.com>; Raven Moody <rmoody@rpkgroup.com>  
**Subject:** Most Recent Files Discussed This Morning

Hopefully you'll have access soon but I wanted you to have access to the info I consult daily as I try to reduce our fixed labor expense.

--

Thanks,

**Bob Shea**  
Vice Chancellor for Finance and Administration  
**University of North Carolina Greensboro**



**From:** [Katie Hagan](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Survey Draft -- Chancellor's Task Force on Administrative Efficiencies  
**Date:** Wednesday, February 8, 2023 8:14:06 PM  
**Attachments:** [UNCG Draft Employee Survey - Administrative Efficiency Opportunities 2.8.23.docx](#)

---

Hi Bob and ,

I was able to connect with yesterday, and they would like to move up the administrative services survey. Specifically, they want the task force to be able to provide input on the survey before we field it. It was a brief conversation, so hopefully the attached brief survey meets their expectations. The anticipated timeline is that the task force provides feedback by Feb 17, and the survey is fielded by Feb 24, though this all depends on the reaction of the task force when it convenes Friday. I'm sharing it with you for your awareness and plan to send to mid-day tomorrow so please let me know if you have any questions or comments.

Thanks,  
Katie

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**University of North Carolina Greensboro**  
**Chancellor's Task Force on Financial Sustainability**  
**Faculty & Staff Survey – DRAFT FOR TASK FORCE FEEDBACK**  
**February 8, 2023**

**Survey Goals:**

1. Identify opportunities for administrative service delivery efficiencies, both overall for UNCG and by specific administrative functions
2. Assess service delivery to identify both pain points and bright spots

*The survey questions below are organized by: A) identification information, B) function-specific questions, and C) general questions to capture anything not shared by function. The goal is for the survey to take respondents fewer than 15 minutes to complete.*

**A. Identification Questions (\* indicates required)**

- 1) Department\*
- 2) Role/Position
- 3) Length of time working at UNCG (years)\*

**B. Functional Feedback (5-point Likert scale): (all required)**

For each administrative function, please respond the extent to which you agree with the statements below.  
(Scale: Strongly Disagree, Disagree, Neither Agree nor Disagree, Agree, Strongly Agree)

- 1) I am satisfied with (Administrative Function) as a customer:
- 2) The (Administrative Function) operates efficiently:
- 3) UNCG should prioritize (Administrative Function) for improvements in the next 6-18 months:
- 4) Comment Box (for each function, but not required to fill in)

Administrative Functions:

- Advancement
- Budget and finance
- Data management and utilization
- Enrollment management
- Facilities (inc. grounds)
- Human resources
- Information technology
- Marketing and communications
- Security
- Student services

**C. General Questions (Short Answer): (not required)**

- 1) What is UNCG and/or your department doing well in terms of increasing the efficiency of administrative service delivery to improve the experience of customers (faculty, students, and staff)?
- 2) Where do you see opportunities for UNCG and/or your department to increase administrative efficiencies, generate cost savings/new revenue and enhance the customer experience?
- 3) What workflow changes or tools (i.e., technology solutions) are required to achieve greater efficiencies?
- 4) What has not been asked or addressed elsewhere in the survey that you would like the task force to be aware of?

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#)  
**Cc:** ; [Mike Daly](#)  
**Subject:** Re: Survey Draft -- Chancellor's Task Force on Administrative Efficiencies  
**Date:** Thursday, February 9, 2023 9:52:04 AM

---

Thank you both!

---

**From:** Bob Shea  
**Sent:** Thursday, February 9, 2023 9:50 AM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Cc:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Subject:** Re: Survey Draft -- Chancellor's Task Force on Administrative Efficiencies

Thanks, looks fine to me. It'll be interesting to see the responses.

On Wed, Feb 8, 2023 at 8:14 PM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Hi Bob and ,

I was able to connect with yesterday, and they would like to move up the administrative services survey. Specifically, they want the task force to be able to provide input on the survey before we field it. It was a brief conversation, so hopefully the attached brief survey meets their expectations. The anticipated timeline is that the task force provides feedback by Feb 17, and the survey is fielded by Feb 24, though this all depends on the reaction of the task force when it convenes Friday. I'm sharing it with you for your awareness and plan to send to mid-day tomorrow so please let me know if you have any questions or comments.

Thanks,  
Katie

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Katie Hagan | Principal | [rpK GROUP](#)

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--

Thanks,

**Bob Shea**

Vice Chancellor for Finance and Administration  
**University of North Carolina Greensboro**





**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Project Update  
**Date:** Thursday, February 9, 2023 12:46:01 PM  
**Attachments:** [Outlook-edlbu31.png](#)  
[UNCG Weekly Project Update 2023.02.09.pdf](#)

---

Hello and Bob,

Attached for your awareness and reference is the weekly project update.

Please let me or Katie know if you have any questions.

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

UNCG



# UNCG & rpk GROUP

## Status Report: February 9, 2023

rpk GROUP  
from mission to market

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# Project Overview: February 3 - February 9

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>rpk GROUP met with IR to review shared data templates and project approach</li> <li>Katie and Mike facilitated project introductions to representative stakeholder groups: Faculty Senate Executive Committee (2/6), Chancellors Council (2/6), Undergraduate Studies Council (2/8) and Graduate Program Directors (2/8)</li> <li>Katie met with leaders of Chancellor’s Fiscal Sustainability Committee (2/7) to align efforts related to the Administrative Services Review. Draft survey questions were shared with [redacted] and Bob for feedback prior to sending to [redacted]</li> <li>Katie shared materials supporting Dean’s Working Group program review explorations</li> <li>rpk GROUP submitted forms required for non-affiliated persons access to UNCG data and dashboards</li> <li>Rick Staisloff met with [redacted] for the first of their monthly meetings (2/9)</li> <li>Scheduled bi-weekly check-ins with [redacted] to ensure alignment with department chair trainings</li> </ul>	<ul style="list-style-type: none"> <li>Meeting with [redacted] and his team on 2/10 to review current academic dashboards</li> <li>Developing data-related project timeline by 2/10</li> <li>Sharing draft administrative services questions with leaders of Fiscal Sustainability Taskforce for their feedback, and potentially listening in on the task force meeting on 2/10</li> <li>Meeting with [redacted] on 2/14 to discuss current utilization of academic data to inform decisions</li> <li>Date/Time TBD, but [redacted] to meet with Katie and Raven on the current AA budgeting process</li> <li>Meeting with [redacted] to continue financial analysis conversation</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>Reviewed draft language for project website and determined that only academic elements would reside on Provost’s website</li> <li>[redacted] facilitated project introductions to representative stakeholder groups</li> <li>Invited faculty to self-nominate to serve on UNCG/rpk Data Team</li> <li>Launched web pages related to academic elements of project on Provost’s website</li> </ul>	<ul style="list-style-type: none"> <li>Confirming faculty participants on UNCG/rpk Data Team</li> </ul>

Key					
	Complete	On Track	At Risk	Off Track	Not Started

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	On Track																									
Data Collection & Verification						On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track																	
Dashboard 1: TBD												On Track	On Track	On Track	On Track	On Track	On Track														
Dashboard 2: TBD																On Track	On Track	On Track	On Track	On Track	On Track										
Faculty Workshops										On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May				June				July					
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	On Track																									
Data Collection & Verification						On Track	On Track	On Track																							
Stakeholder Interview & Survey						On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track																	
Final Report & Recommendations																On Track	On Track	On Track	On Track	On Track	On Track										

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Status Meeting (monthly)	[REDACTED] Rick Staisloff	2/9	Scheduling remaining months
Project Leaders Meeting (bi-weekly)	[REDACTED], Bob, Katie, and Mike	2/15	Review agenda and project tracker
Provost's Council Meeting	Katie and Mike	2/15; 9am	-
Department Chairs Meeting	Katie and Mike	2/16; 9am and 3pm	-
Faculty Data Utilization Meeting	rpk and [REDACTED]	2/14; 2pm	-
Financial Analysis Planning	1. [REDACTED] 2. [REDACTED]	1. TBD 2. 2/16, 11am	

# Data Collection Status

Status	File/Description	Notes
Not Started	Course data	Templates confirmed by IR as aligned with current data structures
Not Started	Academic program list	
Not Started	Academic program data	
Not Started	Instructor data	
Started	Administrative Services Review	Organizational charts and supporting documents shared

Key	Complete	On Track	At Risk	Off Track	Not Started

Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)



**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Project Leaders Meeting Agenda for 2/15  
**Date:** Tuesday, February 14, 2023 8:47:39 AM  
**Attachments:** [Outlook-t4gqwenf.png](#)

---

Hello and Bob,

Katie and I are looking forward to our bi-weekly project check-in meeting with you tomorrow. Our agenda:

- Feedback on projects and engagements
- Academic Data/Dashboards
- Administrative Services Review
- Project Communication
- Next Steps

, we would like to share the composition of the UNCG/rpk Data Team with the Provost's Council tomorrow. If the faculty participants have been identified, can you please share them?

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#);  
**Subject:** Friday schedule  
**Date:** Wednesday, February 15, 2023 3:02:20 PM

---

Hi Bob and ,

I'll be on campus for the task force meeting from 1:30-3:30 on Friday. If you'd like to connect before or after, please let me know.

Best,  
Katie

**rp**k GROUP  
from mission to market

Katie Hagan | Principal | [rp](#)k GROUP

626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490

**From:** [Katie Hagan](#)  
**To:**  
**Cc:** [Bob Shea](#)  
**Subject:** Re: Friday schedule  
**Date:** Wednesday, February 15, 2023 3:46:32 PM

---

Thank works well for me, thanks!

---

**From:**  
**Sent:** Wednesday, February 15, 2023 3:37 PM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Cc:** Bob Shea  
**Subject:** Re: Friday schedule

How about we do lunch in my office at 12:30? We can order from across the street Bob. Let me know if that works Katie and I'll ask to send us the menu.

On Wed, Feb 15, 2023 at 3:02 PM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Hi Bob and ,

I'll be on campus for the task force meeting from 1:30-3:30 on Friday. If you'd like to connect before or after, please let me know.

Best,  
Katie

**rpk** GROUP  
from mission to market

Katie Hagan | Principal | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com) | 757-589-0490

**From:** [Rick Staisloff](#)  
**To:** [Bob Shea](#)  
**Subject:** UNCG in the News  
**Date:** Wednesday, February 15, 2023 5:26:52 PM  
**Attachments:** [image001.png](#)

---

What was everyone's response to this article?

<https://www.wunc.org/education/2023-02-13/unc-greensboro-budget-cuts-carolina-education-colleges>

**rp**k GROUP  
from mission to market

Richard Staisloff | Senior Partner | [rp](#)k GROUP  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Project Tracker and Website update  
**Date:** Thursday, February 16, 2023 8:24:38 PM  
**Attachments:** [Outlook-3av5m1ta.png](#)  
[UNCG Weekly Project Update 2023.02.16.pdf](#)  
[UNCG rpk Project Update for Website 2023.02.16 Shared for Review.docx](#)

---

Hi and Bob,

Attached is the weekly project tracker update for your review.

, attached for your review is the first bi-weekly update for the academic data/dashboard project for posting on the Provost's web page.

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

UNCG



# UNCG & rpk GROUP

## Status Report: February 17, 2023

rpk GROUP  
from mission to market

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# Project Overview: February 9 - February 16

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>• Katie received feedback on the administrative services survey from the Fiscal Sustainability Taskforce. She also will attend the meeting of this group on Friday (2/17).</li> <li>• Mike met with [redacted] on 2/14 to review how current faculty and course data is utilized by Deans and Department Chairs</li> <li>• Katie and Raven met with [redacted] on 2/14 to review current AA budgeting process</li> <li>• Katie met with [redacted] on 2/16 regarding financial analysis</li> <li>• Mike provided project introduction to Deans, Department Heads &amp; Chairs and program directors on 2/16</li> </ul>	<ul style="list-style-type: none"> <li>• Katie visiting UNCG on 2/17</li> <li>• Meeting with Data Stewards on 2/20 to provide project introduction</li> <li>• Meeting with Data Trustees on 2/22 to provide project introduction</li> <li>• First UNCG/rpk Data Team meeting scheduled for 2/23</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>• Confirmed faculty participants on UNCG/rpk Data Team</li> <li>• [redacted] facilitated Katie's on-going involvement as a thought partner in Dean's working group efforts to develop a program review process</li> </ul>	

Key

Complete

On Track

At Risk

Off Track

Not Started

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rpk GROUP  
from mission to market

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track																
Dashboard 1: TBD												On Track	On Track	On Track	On Track	On Track	On Track														
Dashboard 2: TBD																On Track	On Track	On Track	On Track	On Track	On Track										
Faculty Workshops										On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Status Meeting (monthly)	[REDACTED] Rick Staisloff	TBD	Scheduling remaining months
Project Leaders Meeting (bi-weekly)	[REDACTED], Bob, Katie, and Mike	2/27; 10am	Review agenda and project tracker
Data Stewards Meeting	Mike and Data Stewards	2/20; 1pm	-
Academic Data Check-in	Mike and [REDACTED]	2/21; 9am	-
Data Trustees Meeting	Mike and Data Trustees	2/22; 1pm	-
UNCG/rpk Data Team	Team members	2/23; 3pm	-
Graduate Council	Mike and Graduate Council	2/24; 11am	-

# Data Collection Status

Status	File/Description	Notes
Not Started	Course data	Templates confirmed by IR as aligned with current data structures; reviewing definitions with UNCG/rpk Data Team
Not Started	Academic program list	
Not Started	Academic program data	
Not Started	Instructor data	
In progress	Financial Data	Met with financial data leads to discuss collection
Started	Administrative Services Review	Organizational charts and supporting documents shared

Key	Complete	On Track	At Risk	Off Track	Not Started



Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**University North Carolina Greensboro**  
**Academic Data Dashboards**  
**Project Update**  
**February 16, 2023**

rpk GROUP (rpk) has provided multiple stakeholder groups with an overview of the project's objectives and processes. Specifically, rpk has met or will meet with the Chancellor's Council, the Provost's Council, Academic Council, the Faculty Senate Executive Committee, Associate and Assistant Deans, Department Heads/Chairs/Directors, Graduate Council, Undergraduate Studies Council, Data Stewards, and Data Trustees. These meetings have allowed for open discussions about the project and the roles that individuals and groups can and will have in ensuring the long-term sustainability of the work. The rpk team will continue to meet with these groups to provide project updates and solicit feedback throughout the semester. In addition to constituency group meetings, rpk received an introduction to UNCG's current utilization of academic data dashboards.

A UNCG/rpk Data Team has been established. This group will be responsible for supporting development of the approach and methodology related to the academic data informing the new dashboard development. It is anticipated that this group will meet biweekly for the first few months of the project. Various members may meet more frequently with rpk as needed to support data collection and knowledge transfer.

The members of the Data Team are:

- Assistant Controller for Financial Reporting
- Professor, Counseling and Educational Development
- Lead Business Intelligence, Projects, and Reporting
- Professor, Music Education
- HRIS Manager
- Professor, Human Development and Family Studies
- Dean of Undergraduate Studies
- Associate Director of Institutional Research and Enterprise Data Management
- Professor, English
- Assistant Dean for Advising and Student Success
- Finance and Administration Reporting & Visualization

Questions or comments regarding the project can be directed directly to Mike Daly at [mdaly@group.com](mailto:mdaly@group.com) or through [the project's feedback form](#).

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Project Update  
**Date:** Thursday, February 23, 2023 4:17:13 PM  
**Attachments:** [Outlook-yush24in.png](#)  
[UNCG Weekly Project Update 2023.02.23.pdf](#)

Hello and Bob,

Attached is the weekly project update tracker for your review. Please let me know if you have any questions.

, we would like to put this link (<https://www.dropbox.com/s/21wd4fdwuskrx5v/UNCG%20rpk%20Project%20FAQs.pdf?dl=0>) on the project' website. We'll update this document throughout the project as questions arise. Please let me know if you need additional information to facilitate this request.

Finally, Katie and I are looking forward to our project leader check-in meeting on Monday. We'll follow our standard agenda but if there are addition items, please bring those forward for discussion.

- Feedback on projects and engagements
- Academic Data/Dashboards
- Administrative Services Review
- Project Communication
- Next Steps

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209



UNCG



# UNCG & rpk GROUP

## Status Report: February 23, 2023

rpk GROUP  
from mission to market

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# Project Overview: February 16 - February 23

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>• Katie visited UNCG on 2/17 to review project progress with [redacted] and Bob [redacted]</li> <li>• Mike met with [redacted] on 2/21 to initiate conversation regarding integrating rpk's work with on-going training for department chairs</li> <li>• Mike met with Associate Deans on 2/23</li> <li>• rpk facilitated first UNCG/rpk Data Team meeting on 2/23</li> </ul>	<ul style="list-style-type: none"> <li>• Mike meeting with Graduate Council on 2/24</li> <li>• Katie meeting with Academic Council on 3/1</li> <li>• Sharing Frequently Asked Questions (FAQ) link for posting on project site</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>• Launched survey in support of Administrative Services Review</li> </ul>	<ul style="list-style-type: none"> <li>• UNCG IR sharing initial sample data for course, instructor, and academic programs by 3/3</li> <li>• Posting FAQ link on project site</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started



# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track																
Dashboard 1: TBD												On Track	On Track	On Track	On Track	On Track	On Track														
Dashboard 2: TBD																On Track	On Track	On Track	On Track	On Track	On Track										
Faculty Workshops										On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May				June				July					
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						On Track	On Track	On Track	On Track																						
Stakeholder Interviews & Survey						On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track																	
Final Report & Recommendations																On Track	On Track	On Track	On Track	On Track	On Track										

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Status Meeting (monthly)	[REDACTED] Rick Staisloff	3/21; 930am, 4/18; 930am, and 5/15; 12:30pm	Scheduling remaining months
Project Leaders Meeting (bi-weekly)	[REDACTED], Bob, Katie, and Mike	2/27; 10am	Review agenda and project tracker
Graduate Council	Mike and Graduate Council	2/24; 11am	-
Academic Council	Mike and Katie	3/1; 9am	-

# Data Collection Status

Status	File/Description	Notes
On track	Course data	UNCG sharing initial sample course, instructor and academic program data files with rpk
On track	Academic program list	
On track	Academic program data	
On track	Instructor data	
On track	Financial Data	Met with financial data leads to discuss collection
Ontrack	Administrative Services Review	Organizational charts and supporting documents shared

Key	Complete	On Track	At Risk	Off Track	Not Started



Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Project Update  
**Date:** Thursday, February 23, 2023 7:31:29 PM  
**Attachments:** [Outlook-yush24in.png](#)  
[image.png](#)

---

Thanks, . I will make the changes you suggested. The link will remain the same.

-Mike Daly

Michael Daly | Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: [518-796-2209](tel:518-796-2209)

---

**From:**  
**Sent:** Thursday, February 23, 2023 7:26:45 PM  
**To:** Bob Shea  
**Cc:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>; Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Subject:** Re: UNCG/rpk Weekly Project Update

Oops, saw error. Should read:

h faculty, chairs, program heads, and deans

On Thu, Feb 23, 2023 at 6:00 PM Bob Shea wrote:  
I like your edit

On Thu, Feb 23, 2023 at 5:10 PM wrote:  
Mike,  
Sure, I'll post but would like to request a modified answer to this question. If you are in agreement, can you correct before we post the link?  
Thanks,

Is this project focused on the elimination of programs? No, program elimination is not a focus of this project. The project will provide a dashboard to allow stakeholders to understand the entire academic portfolio, including student success across programs. Any decisions regarding the academic portfolio or offerings will follow UNCG's established governance procedures.

My suggestion: No, program elimination is not the focus of this project. The project will provide dashboard data to allow stakeholders to understand the entire academic portfolio, including student success across programs, that can inform decisions. will work with faculty, chairs, program heads, and deans to develop a program review process that may lead to changes in the academic portfolio.

On Thu, Feb 23, 2023 at 4:17 PM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:

Hello [redacted] and Bob,

Attached is the weekly project update tracker for your review. Please let me know if you have any questions.

[redacted], we would like to put this link

(<https://www.dropbox.com/s/21wd4fdwuskrx5v/UNCG%20rpk%20Project%20FAQs.pdf?dl=0>)

on the project's website. We'll update this document throughout the project as questions arise. Please let me know if you need additional information to facilitate this request.

Finally, Katie and I are looking forward to our project leader check-in meeting on Monday. We'll follow our standard agenda but if there are additional items, please bring those forward for discussion.

- Feedback on projects and engagements
- Academic Data/Dashboards
- Administrative Services Review
- Project Communication
- Next Steps

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Associate | [rpk GROUP](#)

[626C Admiral Drive, Suite 511, Annapolis, MD 21401](#)

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

--

Thanks,

**Bob Shea**

Vice Chancellor for Finance and Administration

**University of North Carolina Greensboro**



--

UNC Greensboro

201 Mossman Building  
Greensboro, NC 27412



**UNC GREENSBORO**

*Find your way here*



**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** rpk/UNCG Project Leaders Meeting

---

rpk GROUP is inviting you to a scheduled Zoom meeting.

Topic: rpk/UNCG Project Leaders Meeting  
Time: Mar 23, 2023 4pm AM Eastern Time (US and Canada)

Join Zoom Meeting  
<https://us02web.zoom.us/j/86898352263>

Meeting ID:  
One tap mobile  
+16469313860,,86898352263# US  
+16468769923,,86898352263# US (New York)

Dial by your location  
+1 646 931 3860 US  
+1 646 876 9923 US (New York)  
+1 305 224 1968 US  
+1 309 205 3325 US  
+1 312 626 6799 US (Chicago)  
+1 301 715 8592 US (Washington DC)  
+1 360 209 5623 US  
+1 386 347 5053 US  
+1 507 473 4847 US  
+1 564 217 2000 US  
+1 669 444 9171 US  
+1 669 900 6833 US (San Jose)  
+1 689 278 1000 US  
+1 719 359 4580 US  
+1 253 205 0468 US  
+1 253 215 8782 US (Tacoma)  
+1 346 248 7799 US (Houston)

Meeting ID:  
Find your local number: <https://us02web.zoom.us/u/kebUs87NGb>

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Project Update Tracker  
**Date:** Thursday, March 2, 2023 7:47:30 PM  
**Attachments:** [Outlook-pkmn3dmg.png](#)  
[UNCG Weekly Project Update 2023.03.03.pdf](#)

---

Hello and Bob,

Attached is the weekly update on the project's progress. Please let me or Katie know if you have any questions.

I will be attending a conference in the early part of next week but will be available via email/phone as needed.

Have a great weekend.

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

UNCG



# UNCG & rpk GROUP

## Status Report: March 3, 2023

rpk GROUP  
from mission to market

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# Project Overview: February 23 - February 2

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>• Katie met with Academic Council on 3/1 to share project progress</li> <li>• Met with working finance data group on 3/1 to structure approach to sharing sample data</li> <li>• Established bi-weekly meeting schedule through June for UNCG/rpk Data Team</li> <li>• Established monthly meeting schedule with _____ and Rick Staisloff</li> </ul>	<ul style="list-style-type: none"> <li>• Meeting with UNCG IR to review data requests related to academic programs</li> <li>• Reviewing results of survey in support of Administrative Services Review; sharing with Task Force on 3/2/23 (though survey is open through end of day 3/2/23)</li> <li>• Reviewing of draft data shared by UNCG IR in support of Academic dashboard development</li> <li>• UNCG/rpk Data Team meeting on 3/9</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>• Shared sample course data in support of Academic dashboards</li> </ul>	<ul style="list-style-type: none"> <li>• UNCG IR sharing initial sample data for instructor, and academic programs by 3/3</li> <li>• Posting FAQ link on project site</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May				June				July					
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	On Track	On Track	On Track	On Track	On Track	On Track	On Track																
Dashboard 1: TBD												On Track	On Track	On Track	On Track	On Track	On Track														
Dashboard 2: TBD																On Track	On Track	On Track	On Track	On Track	On Track										
Faculty Workshops										On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May				June				July					
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	On Track																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	On Track	On Track	On Track	On Track	On Track	On Track																	
Final Report & Recommendations																On Track	On Track	On Track	On Track	On Track	On Track										

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Status Meeting (monthly)	[Redacted] Rick Staisloff	3/21, 930am 4/18, 930am 5/15, 12:30pm	-
Project Leaders Meeting (bi-weekly)	[Redacted] Bob, Katie, and Mike	3/15, 8:30am	Review agenda and project tracker
UNCG/rpk Data Team	Data Team members	3/9, 3pm	-
Graduate Program Directors Roundtable	-	3/8, 11am	Sharing written update
Provost's Council	Katie, Mike and Provost's Council	3/15, 9am	-

# Data Collection Status

Status	File/Description	Notes
On track	Course data	UNCG shared initial sample course data on 2/28, sample instructor and academic program data files are being constructed
On track	Academic program list	
On track	Academic program data	
On track	Instructor data	
On track	Financial Data	Met with financial data leads to discuss collection
Complete (survey closes 3/2/23)	Administrative Services Review	Survey data collection on-going; Organizational charts and supporting documents shared

Key	Complete	On Track	At Risk	Off Track	Not Started



Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**From:** [Mike Daly](#)  
**To:**  
**Cc:** [Bob Shea](#); [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Project Update Tracker  
**Date:** Friday, March 3, 2023 8:39:34 AM  
**Attachments:** [Outlook-pkmn3dmg.png](#)

---

Thanks

Meeting with the faculty senate is entirely fine on our end. We can discuss next steps after you confirm with the chair.

Thanks again,  
Mike Daly

Michael Daly | Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: [518-796-2209](tel:518-796-2209)

---

**From:**  
**Sent:** Friday, March 3, 2023, 8:12 AM  
**To:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Cc:** Bob Shea ; Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Subject:** Re: UNCG/rpk Project Update Tracker

Thank you Mike.

We had a senate meeting this week and it sounds like they would like rpk to come to the senate meeting for q and a. I will confirm with the senate chair on this but wanted to give you a heads up. My suggestion would be to provide a quick overview of the slides and q and a and then continue to work with the executive faculty group. Let me know if you are okay with this potential request.

On Fri, Mar 3, 2023 at 8:00 AM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:

Hello and Bob,

Attached is the weekly update on the project's progress. Please let me or Katie know if you have any questions.

I will be attending a conference in the early part of next week but will be available via email/phone as needed.

Have a great weekend.

Thanks again,  
Mike Daly

rpk GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

**From:** [Katie Hagan](#)  
**To:** ; [Mike Daly](#)  
**Cc:** [Bob Shea](#)  
**Subject:** Re: UNCG/rpk Project Update Tracker  
**Date:** Friday, March 3, 2023 1:26:17 PM  
**Attachments:** [Outlook-pkmn3dmg.png](#)

---

Thank you, . We'll hold the time on our calendars.

Best,  
Katie

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**From:**  
**Sent:** Friday, March 3, 2023 11:41 AM  
**To:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Cc:** Bob Shea ; Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Subject:** Re: UNCG/rpk Project Update Tracker

Mike and Katie,  
The chair of faculty senate would like to invite you to the next senate meeting on April 5, 2023 at 3pm and will put you at the beginning of the agenda. I'll share the link with you once it's established.

Thanks much,

On Fri, Mar 3, 2023 at 8:39 AM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:

Thanks

Meeting with the faculty senate is entirely fine on our end. We can discuss next steps after you confirm with the chair.

Thanks again,  
Mike Daly

Michael Daly | Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: [518-796-2209](tel:518-796-2209)

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**Sent:** Friday, March 3, 2023, 8:12 AM  
**To:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Cc:** Bob Shea ; Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Subject:** Re: UNCG/rpk Project Update Tracker

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Have a great weekend.

Thanks again,  
Mike Daly

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from mission to market

Michael Daly | Senior Associate | [rpk GROUP](https://www.rpkgroup.com)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Project Update  
**Date:** Friday, March 10, 2023 9:28:48 AM  
**Attachments:** [Outlook-1v0vi4o0.png](#)  
[UNCG rpk Project Update for Website 2023.03.10 Shared for Review.docx](#)  
[UNCG Weekly Project Update 2023.03.09.pdf](#)

---

Hi and Bob,

Attached is the weekly project update tracker for your review. also attached is the draft copy for the bi-weekly update to the project website. Feel free to adjust the wording as necessary.

Please let me know if you have any questions before our check-in meeting next Wednesday.

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209



UNCG



# UNCG & rpk GROUP

## Status Report: March 10, 2023

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from mission to market

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# Project Overview: March 3 - March 9

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpK GROUP	<ul style="list-style-type: none"> <li>UNCG/rpK Data Team met on 3/9 to review shared sample course and instructor data</li> <li>Shared results of Administrative Services Review survey with Task Force</li> <li>Provided written project update to Graduate Program Directors for 3/8 meeting</li> </ul>	<ul style="list-style-type: none"> <li>Meeting with Faculty Senate Executive Committee on 3/13</li> <li>Meeting with Provost's Council on 3/15</li> <li>Developing mapping of academic structure for dashboard foundation</li> <li>Katie attending Task Force on Financial Responsibility 3/17</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>Shared data supporting mapping of academic program</li> </ul>	<ul style="list-style-type: none"> <li>UNCG IR sharing initial academic program data by 3/10</li> <li>Posting bi-weekly project update to project site</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started



# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May				June				July					
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	On Track	On Track	On Track	On Track	On Track	On Track	On Track																
Dashboard 1: TBD												On Track	On Track	On Track	On Track	On Track	On Track														
Dashboard 2: TBD																On Track	On Track	On Track	On Track	On Track	On Track										
Faculty Workshops										On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	

Note: Mike continues to meet with [redacted] re: faculty workshops. A detailed plan is not in place, but working to iron out details about how rpk can support the ongoing training efforts.

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk																		
Final Report & Recommendations																Complete	Complete	Complete	Complete	Complete	Complete										

Note: rpk is providing support for the Chancellor’s Task Force on Financial Responsibility in place of what was originally scoped for the administrative services review. Katie is continuing to attend those meetings and engaging when asked (e.g., distributing and analyzing the stakeholder feedback survey). Stakeholder interviews and additional analysis and report drafting will be on hold until the Task Force work advances and rpk has a better idea of how to best add value.

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Status Meeting (monthly)	[REDACTED] Rick Staisloff	3/21, 930am 4/18, 930am 5/15, 12:30pm	-
Project Leaders Meeting (bi-weekly)	[REDACTED], Bob, Katie, and Mike	3/15, 8:30am	Review agenda and project tracker
Faculty Senate Executive Committee	Katie, Mike and Committee	3/13, 12:30pm	Sharing written update
Provost's Council	Katie, Mike and Provost's Council	3/15, 9am	-
Task Force on Financial Responsibility	Katie	3/17 10am	-

# Data Collection Status

Status	File/Description	Notes
On track	Course data	UNCG shared initial sample course and instructor data. Sample academic program data being shared 3/10.
On track	Academic program list	
On track	Academic program data	
On track	Instructor data	
On track	Financial Data	On-going meetings with with financial data leads to discuss collection.
Complete (survey closed 3/2/23)	Administrative Services Review	Survey data results reviewed and shared.

Key	Complete	On Track	At Risk	Off Track	Not Started



Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**University North Carolina Greensboro**  
**Academic Data Dashboards**  
**Project Update**  
**March 10, 2023**

Since the last project update on February 16, 2023, rpk GROUP (rpk) continued to engage multiple stakeholder groups with project updates. The Faculty Senate is tentatively scheduled to receive a project introduction and update from rpk GROUP on April 5, 2023. This will also be an opportunity for members of the Faculty Senate to ask questions and provide input.

The UNCG/rpk Data Team met for the first time on February 23, 2023. Team members reviewed the scope and objectives of the project and were asked to review data templates provided by rpk. UNCG IR's Department facilitated the sharing of sample data sets from one semester for review by rpk and Data Team members. Bi-weekly meetings of the Data team will occur throughout the duration of the project.

Questions or comments regarding the project can be directed directly to Mike Daly at [mdaly@group.com](mailto:mdaly@group.com) or through [the project's feedback form](#).

rpk GROUP

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#); [Mike Daly](#)  
**Cc:**  
**Subject:** Re: UNCG/rpk Weekly Project Update  
**Date:** Friday, March 10, 2023 3:16:01 PM  
**Attachments:** [Outlook-1v0yi4o0.png](#)  
[image.png](#)

---

Hi Bob,

Absolutely we can talk more about that next week. It's primarily a note to clarify why we are not doing stakeholder interviews or going further at this exact moment with the administrative services review as originally proposed in the scope of work -- we don't want to duplicate efforts or cause any confusion with the work of the Task Force, and [redacted] has indicated that he'll need additional support for the Task Force from rpk in terms of vetting and quantifying recommendations. The work of the Task Force needs to evolve a bit further before we have a clear idea of full scope/expectation of what is needed from rpk, and from there we can assess what, if any, additional analyses would be done related to administrative services (outside the work of the Task Force).

Best,  
Katie

---

**From:** Bob Shea  
**Sent:** Friday, March 10, 2023 1:44 PM  
**To:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Cc:** [Katie Hagan <khagan@rpkgroup.com>](mailto:khagan@rpkgroup.com)  
**Subject:** Re: UNCG/rpk Weekly Project Update

Thanks for the update. From slide 4, I'm note exactly sure what this note means and would like to discuss it at our next meeting.

Note: rpk is providing support for the Chancellor's Task Force on Financial Responsibility in place of what was originally scoped for the administrative services review. Katie is continuing to attend those meetings and engaging when asked (e.g., distributing and analyzing the stakeholder feedback survey). Stakeholder interviews and additional analysis and report drafting will be on hold until the Task Force work advances and rpk has a better idea of how to best add value.

On Fri, Mar 10, 2023 at 9:28 AM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:

Hi [redacted] and Bob,

Attached is the weekly project update tracker for your review. [redacted] also attached is the draft copy for the bi-weekly update to the project website. Feel free to adjust the wording as necessary.

Please let me know if you have any questions before our check-in meeting next Wednesday.

Thanks again,  
Mike Daly

rpk GROUP

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Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

--

Thanks,

**Bob Shea**

Vice Chancellor for Finance and Administration

**University of North Carolina Greensboro**





**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#); [Mike Daly](#)  
**Cc:**  
**Subject:** Re: UNCG/rpk Weekly Project Update  
**Date:** Wednesday, March 15, 2023 9:13:26 AM  
**Attachments:** [Outlook-1v0yi4o0.png](#)  
[image.png](#)

---

Hi Bob,

let us know you are in Raleigh today - I hope it proves productive! We spoke briefly about the Task Force and the administrative services review, and it seems like a good next step in the coming weeks will be for you, to align on expectations for us in terms of Task Force support and analyses/recommendations outside of the task force related to administrative services. Let me know if you would like to talk more about any of this, however. I am available Friday afternoon after 2pm (and may be on campus Friday - will know more after I speak to later today).

Best,  
Katie

---

**From:** Katie Hagan <khagan@rpkgroup.com>  
**Sent:** Friday, March 10, 2023 3:16 PM  
**To:** Bob Shea ; Mike Daly <mdaly@rpkgroup.com>  
**Cc:**  
**Subject:** Re: UNCG/rpk Weekly Project Update

Hi Bob,

Absolutely we can talk more about that next week. It's primarily a note to clarify why we are not doing stakeholder interviews or going further at this exact moment with the administrative services review as originally proposed in the scope of work -- we don't want to duplicate efforts or cause any confusion with the work of the Task Force, and has indicated that he'll need additional support for the Task Force from rpk in terms of vetting and quantifying recommendations. The work of the Task Force needs to evolve a bit further before we have a clear idea of full scope/expectation of what is needed from rpk, and from there we can assess what, if any, additional analyses would be done related to administrative services (outside the work of the Task Force).

Best,  
Katie

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**From:** Bob Shea  
**Sent:** Friday, March 10, 2023 1:44 PM  
**To:** Mike Daly <mdaly@rpkgroup.com>

**Cc:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** Re: UNCG/rpk Weekly Project Update

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Note: rpk is providing support for the Chancellor's Task Force on Financial Responsibility in place of what was originally scoped for the administrative services review. Katie is continuing to attend those meetings and engaging when asked (e.g., distributing and analyzing the stakeholder feedback survey). Stakeholder interviews and additional analysis and report drafting will be on hold until the Task Force work advances and rpk has a better idea of how to best add value.

On Fri, Mar 10, 2023 at 9:28 AM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:

Hi [redacted] and Bob,

Attached is the weekly project update tracker for your review. [redacted] also attached is the draft copy for the bi-weekly update to the project website. Feel free to adjust the wording as necessary.

Please let me know if you have any questions before our check-in meeting next Wednesday.

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpkgroup.com](http://rpkgroup.com)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

--

Thanks,

**Bob Shea**

Vice Chancellor for Finance and Administration

**University of North Carolina Greensboro**



**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk - Request for Review Project Feedback Form  
**Date:** Wednesday, March 15, 2023 9:15:06 AM  
**Attachments:** [Outlook-5h1mvqqk.png](#)  
[Response to UNCG Feedback Form Shared for Review 2023.03.15.docx](#)

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Hi and Bob,

Attached are rpk's proposed responses to a series of questions submitted by one individual to the project feedback form. While we'll respond directly to this individual (a direct response was requested in the form) we'd also like to use these questions and responses as part of the site's public FAQ document.

Please review, providing any suggestions or comments as necessary.

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
mdaly@rpkgroup.com | Cell: 518-796-2209

I have concern that the comparison to peer data, seem like an add-on. I am still a huge believer in the Delaware study do understand efficiency and productivity vs peer programs. It is a data set hat has pretty defined expectations for data entry. As provost in three universities and Dean in another, the Delaware study was critical in understanding what instructional/costs per credit hour in different disciplines and where units were have subpar productivity and efficiency. I know that Delaware data can be a year or two old. At the provost level, I found it to be a very strong tool. I spent In working with deans in four institutions regarding considering purchasing EAB's Academic Performance, which seems to produce similar metrics, the deans felt those data were relatively useless without being able to use data without a context of productivity and efficiency metrics from peer schools- and it requires perfect data- academic data here is terrible- it is most accurate at the department level. Additionally, the dashboard was of no use to them, since most of the used the data that EAB would just turn in dashboards . Even our teaching productivity is badly flawed. For example, the most productive person in that ranking that is posted is an instructor of record for like 30 lab sections.. he does not teach any of them. So, here are some questions:

Why is the Delaware Study not mentioned in the data context? Why are the metrics not aligned with Delaware Study metrics? If you are using another data base to compare peer programs, what is it?

**Proposed FAQ: Is this project comparing UNCG to its peers?**

**Response: rpk GROUP is working with UNCG to establish a single source of data truth that allows academic leaders to be as informed as possible about their departments and programs. The scope of the project does not include developing a new mechanism for comparing UNCG's academic programs to its peers.**

Some of the data are hard to get and irrelevant. I know politics want us to match program to job demand. But, the only data that matters if students get jobs and feel successful in those job. In five years, the top jobs will probably different, or require training in things we don't even know. How are planning to find the job data.

**Proposed FAQ: How are labor market trends being determined in this project?**

**Response: Projected labor market trends will be identified by cross-walking classification of instruction program (CIP) codes to standard occupation classification (SOC) codes. That crosswalk will be aligned with data made publicly available from the Bureau of Labor Statistics.**

I happen to particularly concerned in efforts like this, how is each data metric going to be used. The list looks like throwing spaghetti on a wall and see what sticks- and I find that horribly inefficient and dangerous. So, I think that each metric should have a paragraph about why this data was chosen and how this data is going to help make decisions. If the answers "we won't know until see it" or if duplicates other metrics getting at the same thing, then that metric should be deleted. I don't believe in more metrics is better. Multi-metric models rarely work in these sorts of program evaluations. So, do agree or disagree with this and why? Will there be short paragraphs describing why each data metric is important and how it will be used?

Response: rpk GROUP's approach to understanding a diverse academic portfolio and academic departments is that no one data point is more important than another. As any new data definitions are developed, UNCG's established Data Governance processes will be utilized to formalize those definitions to ensure the sustainability and replicability of the work.

UNCG's structured and on-going trainings for department chairs and other academic leaders will be utilized as an opportunity to provide an initial introduction to how participants understand and use the academic data dashboards to make decisions.

Are deans, heads, chairs and program directors going to get to view the data before anything is published? Again, as provost here, I can tell you that central data on academic performance and productivity is seriously flawed- department have to keep there own shadow systems since Banner reporting is terrible. The dean/department level data is far better?

Proposed FAQ: How will academic leaders be engaged in this work?

Response: The development of the academic data dashboards that are part of rpk GROUP's engagement with UNCG are intended to move UNCG toward a single source of data truth. Opportunities will be offered to stakeholders to review the dashboards in their early development stages. It is the expectation that these dashboards will be refined over time, as informed by the user experience and UNCG's needs.

Is the business model of RPK similar to the Hunter Group (the major consulting firm that were hospitals that were financially hemorrhaging -i.e.. to be the cost cutting experts for universities in financial crisis? Or, is RPK trying to compete with EAB's Academic Performance solutions

Proposed FAQ: None

Response: rpk GROUP is a higher education consulting firm that partners with clients throughout the U.S. and globally, including two-year and four-year institutions, public and private sector institutions, membership organizations, and foundations. We specialize in sustainable financial models, strategic platform creation, and the financial model behind mission and equitable student success.

All of the metrics are academic metrics. Why are there no administrative metrics on performance, efficiency & cost? Having served as provost in three places there are several administrative functions that are broken and costly (particularly in opportunity costs)- HR is an example. I don't think that Student's First has demonstrated an ROI; mid-term grade reports and starfish reporting waste huge amounts of time. Starfish is a ridiculously bad early intervention system. Finance is a mess. Wil RPK look at revenue generating ideas that also help retention- e.g. amount of debt that triggers registration holds?

Continuing from above Student affairs also has programs that are used by few students. Will there be dashboards for them? Will RPK examine the impact of the athletic fee on enrollment?

Proposed FAQ: Does this project look at administrative functions or other areas of the university?

Response: rpk GROUP's engagement with UNCG includes providing data analytical support for the Chancellor's Taskforce on Sustainability. That taskforce is focused on identifying potential opportunities to realize non-academic efficiencies in how UNCG provides services and supports to faculty, staff, and students.

rpk GROUP will not be assisting UNCG in developing dashboards for student affairs. The impact of isolated fees on enrollment will not be part of rpk GROUP's work.

I think that only reasons that a university would hire a consulting firm like RPK would be: 1) the financial problems are enormous; 2) the administration does not know what to do, or can't do it by themselves. Thus, I am highly skeptical of the project, the dashboard metrics and whether transparency will be real and that the faculty will have input. You can read about my feelings about the little bit I know about the project <https://www.jim-coleman-phd.com/blogs-musings-and-podcasts/open-letter-to-uncg-faculty>

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Project Update  
**Date:** Friday, March 17, 2023 8:35:38 AM  
**Attachments:** [Outlook-lluubrop.png](#)  
[UNCG Weekly Project Update 2023.03.16.pdf](#)

---

Hi and Bob,

Attached is the weekly project update for your review. Please let Katie or me know if you have any questions.

Have a wonderful weekend!

Thanks again,  
Mike Daly

**rp**k GROUP

from mission to market

Michael Daly | Senior Associate | [rp](#)k GROUP

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

UNCG



# UNCG & rpk GROUP

## Status Report: March 17, 2023

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from mission to market

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# Project Overview: March 10 - March 16

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>• Drafted an initial mapping of UNCG’s academic structure that will inform the academic data dashboards</li> <li>• Provided project updated to Faculty Senate Executive Committee (3/13) and Provost’s Council (3/15)</li> <li>• Raven Moody met with HR and UNCG IR to review approach to collecting and validating faculty data (3/14)</li> </ul>	<ul style="list-style-type: none"> <li>• Mike meeting with _____ on (3/17) to review training opportunities for academic leaders</li> <li>• Katie attending Task Force on Financial Responsibility (3/17)</li> <li>• Project updates and conversations with: Data Stewards (3/20), Data Trustees (3/22), Associate and Assistant Deans (3/23). and Undergraduate Council (3/23)</li> <li>• UNCG/rpk Data Team meeting (3/23)</li> </ul>
	<ul style="list-style-type: none"> <li>• Posted bi-weekly project update to project site</li> <li>• Provided Board of Trustees with project update</li> <li>• Shared draft program review process with UNCG faculty</li> </ul>	<ul style="list-style-type: none"> <li>• UNCG IR continuing to share data related to course, instructor, and faculty activities</li> <li>• Rick meeting with _____ (3/21)</li> </ul>

Key					
	Complete	On Track	At Risk	Off Track	Not Started



# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May				June				July											
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31						
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																															
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	On Track	On Track	On Track	On Track																						
Dashboard 1: TBD												On Track	On Track	On Track	On Track	On Track	On Track																				
Dashboard 2: TBD																		On Track	On Track	On Track	On Track	On Track															
Faculty Workshops												Complete	Complete	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track

Note: Mike continues to meet with [redacted] re: faculty workshops. A detailed plan is not in place, but working to iron out details about how rpk can support the ongoing training efforts.

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk																		
Final Report & Recommendations																On Track	On Track	On Track	On Track	On Track	On Track										

Note: rpk is providing support for the Chancellor's Task Force on Financial Responsibility in place of what was originally scoped for the administrative services review. Katie is continuing to attend those meetings and engaging when asked (e.g., distributing and analyzing the stakeholder feedback survey). Stakeholder interviews and additional analysis and report drafting will be on hold until the Task Force work advances and rpk has a better idea of how to best add value.

Key	Complete	On Track	At Risk	Off Track	Not Started
	Complete	On Track	At Risk	Off Track	Not Started

# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Status Meeting (monthly)	[REDACTED] Rick Staisloff	3/21, 930am 4/18, 930am 5/15, 12:30pm	-
Project Leaders Meeting (bi-weekly)	[REDACTED], Bob, Katie, and Mike	3/23, 4:00pm	Review agenda and project tracker
Data Stewards Meeting	Mike and Data Stewards	3/20	Providing written update
Data Trustees Meeting	Mike and Data Trustees	3/22	Providing written update
Undergraduate Council	Mike and Council	3/23, 3:00pm	-
Associate and Assistant Deans	Mike and Deans	3/23, 11:00am	-
UNCG/rpk Data Team	Data Team members	3/23, 10am	-



# Data Collection Status

Status	File/Description	Notes
On track	Course data	UNCG shared initial sample course and instructor data. Sample academic program data being shared 3/10.
On track	Academic program list	
On track	Academic program data	
On track	Instructor data	
On track	Financial Data	On-going meetings with with financial data leads to discuss collection.
Complete (survey closed 3/2/23)	Administrative Services Review	Survey data results reviewed and shared.

Key	Complete	On Track	At Risk	Off Track	Not Started

Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**From:** [Mike Daly](#)  
**To:** ; [Katie Hagan](#); [Bob Shea](#)  
**Subject:** Re: UNCG/rpk - Request for Review Project Feedback Form  
**Date:** Friday, March 17, 2023 10:03:53 AM  
**Attachments:** [Outlook-5h1mvqgk.png](#)

---

Thanks as always for the close read and feedback.

We'll incorporate your first two suggestions in the FAQ. In keeping the FAQ focused on the project we won't be providing an FAQ related to rpk's business model. rpk's role is well explained in the project site's introductory paragraph.

Have a great weekend as well!

Best,  
Mike Daly  
rpk GROUP

---

**From:**  
**Sent:** Friday, March 17, 2023 8:48 AM  
**To:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>; Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>; Bob Shea

**Subject:** Re: UNCG/rpk - Request for Review Project Feedback Form

Good morning MIke,

regarding this, a few suggestions:

1. At the top of the FAQ you might edit it to read:

This document provides an on-going record of questions submitted by members of the UNCG community and rpk GROUP's answers related to the work that it is supporting. Questions are not verbatim but are edited for clarity, length and to summarize common themes that emerge.

2. What's the proposed question for the data metric question (request for short paragraphs) or do you want to add the whole paragraph. To refrain from editorializing, I suggest the question: How is each data metric going to be used? Will there be a descriptions for why each data metric is important and how it will be used".

3. The business model question. You note no proposed FAQ. Does that mean you want to post the full question as submitted? I would prefer to refrain from editorializing so suggest this question rewrite: "What is the business model and goals of rpk?"

Have a great weekend,

On Wed, Mar 15, 2023 at 10:00 AM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:  
| Hi and Bob,

Attached are rpk's proposed responses to a series of questions submitted by one individual to the project feedback form. While we'll respond directly to this individual (a direct response was requested in the form) we'd also like to use these questions and responses as part of the site's public FAQ document.

Please review, providing any suggestions or comments as necessary.

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209



**From:** [Rick Staisloff](#)  
**To:** [Bob Shea](#)  
**Cc:** [Laura Reames](#);  
**Subject:** UNCG - Progress Invoice 23-0025 - February - RPK GROUP  
**Date:** Tuesday, March 21, 2023 11:28:37 AM  
**Attachments:** [image001.png](#)  
[UNCG - rpk GROUP - Progress Invoice 23-0025 - February 2023.pdf](#)

---

Bob,

Attached please find our progress invoice for February.

Let me know if you have any questions, or require additional information to process this.

Regards,

Rick

**rpk** GROUP  
from mission to market

Richard Staisloff | Senior Partner | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

# rpk GROUP

626C Admiral Drive, Suite 511  
Annapolis, MD 21401, United States  
Tel: 410-591-9018  
rstaisloff@rpkgroup.com  
www.rpkgroup.com



## INVOICE

Robert Shea  
University of North Carolina-Greensboro  
1400 Spring Garden Ct  
Greensboro, NC 27412

TAX ID:  
INVOICE DATE: 3/8/2023  
INVOICE NO: 23-0025  
BILLING THROUGH: 2/28/2023

PROFESSIONAL SERVICES	HOURS	RATE	AMOUNT
Assoc ate	101.25	\$350.000	\$35,437.50
Pr nc pa	30.75	\$450.000	\$13,837.50
Sen or Assoc ate	0.50	\$350.000	\$175.00
Sen or Partner	2.00	\$450.000	\$900.00
Spec a st ll	10.00	\$1.000	\$10.00
<b>TOTAL SERVICES</b>	<b>144.50</b>		<b>\$50,360.00</b>
		<b>SUBTOTAL</b>	<b>\$50,360.00</b>
		<b>AMOUNT DUE THIS INVOICE</b>	<b>\$50,360.00</b>

This invoice is due on 4/7/2023

Richard Staisloff, Senior Partner  
rstaisloff@rpkgroup.com

Laura Reames, Billing Contact  
lreames@rpkgroup.com

Remit payment to:  
rpk GROUP  
626C Admiral Drive, Suite 511  
Annapolis, MD 21401

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Project Update Tracker  
**Date:** Thursday, March 23, 2023 11:16:08 AM  
**Attachments:** [UNCG rpk Project Update for Website\\_2023.03.23\\_Shared for Review.docx](#)  
[UNCG Weekly Project Update 2023.03.23.pdf](#)

---

Hello and Bob,

I'm sharing (attached) the weekly project early this week to allow for discussion during this afternoon's project leaders meeting. Katie will be leading that meeting for rpk. Also attached for your review is the short bi-weekly update for the academic dashboard project site.

Thank you,  
Mike Daly  
rpk GROUP

**University North Carolina Greensboro**  
**Academic Data Dashboards**  
**Project Update**  
**March 23, 2023**

Since the last project update on March 10, 2023, rpk GROUP (rpk) has continued to engage multiple stakeholder groups with project updates. Initial planning of rpk's role in on-going trainings for academic leaders as offered through the Provost's Office is underway. The Faculty Senate is scheduled to receive a project introduction and update from rpk on April 5, 2023. This will also be an opportunity for members of the Faculty Senate to ask questions and provide input.

The UNCG/rpk Data Team continues to meet regularly to review data files and definitions that will inform the Academic Data dashboards. As definitions are finalized, they will be communicated with UNCG's established data governance groups to ensure transparency and replicability.

Questions or comments regarding the project can be directed directly to Mike Daly at [mdaly@group.com](mailto:mdaly@group.com) or through [the project's feedback form](#).

rpk GROUP

UNCG



# UNCG & rpk GROUP

## Status Report: March 23, 2023

rpk GROUP  
from mission to market

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# Project Overview: March 17 - March 23

Overall Status	Project Status Overview & Key Items for Attention	
At Risk	<ul style="list-style-type: none"> <li>Based on availability of academic data a revised timeline is shared on slide 6.</li> </ul>	
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>Katie attended Task Force on Financial Responsibility (3/17)</li> <li>Provided written project updates to Data Stewards and Data Trustees (3/20)</li> <li>Met with _____ to review UNCG course section data (3/20)</li> <li>Rick Staisloff met with _____ (3/21)</li> <li>Confirmed approach to pulling financial data with UNCG (3/21)</li> <li>Provided project updates to Associate and Assistant Deans (3/23)</li> <li>Provided project updates to Undergraduate Studies Council (3/23)</li> <li>Reviewed updated timeline with Data Team (3/23)</li> </ul>	<ul style="list-style-type: none"> <li>Providing project update to Academic Council (3/29)</li> <li>Sharing draft presentation for Faculty Senate meeting (4/5)</li> <li>Reviewing shared course data and financial data</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>Shared requested course data for 2020-2022</li> <li>Shared financial data for 2020-2022</li> <li>Provided responses to questions about current active programs</li> </ul>	<ul style="list-style-type: none"> <li>Generating queries for faculty data from UNC system and UNCG Banner</li> <li>Reviewing draft presentation of rpk's project update to Faculty Senate</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	Off Track	Not Started	Not Started	Not Started																
Dashboard 1: TBD												Off Track	Not Started	Not Started	Not Started	Not Started	Not Started														
Dashboard 2: TBD																Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started									
Faculty Workshops											Complete	Complete	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started

Note: Based on availability of academic data a revised timeline has been generated and is available on slide 6.

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk																		
Final Report & Recommendations																On Track	On Track	On Track	On Track	On Track	On Track										

Note: rpk is providing support for the Chancellor’s Task Force on Financial Responsibility in place of what was originally scoped for the administrative services review. Katie is continuing to attend those meetings and engaging when asked (e.g., distributing and analyzing the stakeholder feedback survey). Stakeholder interviews and additional analysis and report drafting will be on hold until the Task Force work advances and rpk has a better idea of how to best add value.

Key	Complete	On Track	At Risk	Off Track	Not Started
-----	----------	----------	---------	-----------	-------------



# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Status Meeting (monthly)	[Redacted] Rick Staisloff	4/18, 930am 5/15, 12:30pm	-
Project Leaders Meeting (bi-weekly)	[Redacted], Bob, Katie, and Mike	3/23, 4:00pm	Review project tracker
Academic Council	Mike and Academic Council	3/29, 9am	Providing written update
Task Force on Financial Sustainability	Katie	3/31, 10am-12pm	-
Faculty Senate Meeting	Katie, Mike, and Faculty Senate	4/5, 3pm	UNCG project leaders will review draft presentation

# Revised Timeline – Academic Data/Dashboards

Data	All Data Collected	Definitions and Methodology Confirmed	Data Validated	Beta Dashboard Launch and Feedback Period	Beta Dashboard Refined Based on Feedback
Academic Program List	3/24	4/6	4/7	4/28 – 5/12	5/19
Academic Structure	4/7	4/13	N/A	4/28 – 5/12	5/19
Course Data	3/24	4/6	4/14	4/28 – 5/12	5/19
Instructor Data	3/31	4/13	4/21	4/28 – 5/12	5/19
Faculty Data*	3/31	4/13	4/21	4/28 – 5/12	5/19
Academic Program Data#	3/31	4/6	4/14	4/28 – 5/12	5/19
Finance Data	3/24	4/6	4/28	TBD	TBD

\*Dependent on new data queries being structured and tested

#Sample data has not been shared

Key	Complete	On Track	At Risk	Off Track	Not Started

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from mission to market



Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Draft Deck for 4/5 Presentation to Faculty Senate and notes for Academic Council  
**Date:** Monday, March 27, 2023 12:15:46 PM  
**Attachments:** [Outlook-ju2kv0d3.png](#)  
[UNCG rpk Faculty Senate Project Introduction and Update\\_Shared20230327.pdf](#)

---

Hi and Bob,

Attached is the draft presentation for the presentation to the Faculty Senate on April 5th. Please note that the timeline (slide 10) for Institutional Efficiencies and Service Improvement has been adjusted to allow time for the Chancellor's Taskforce to complete its work. We are targeting the presentation to the Faculty Senate at 10-12 minutes, leaving 18-20 minutes for discussion. Please review and let me know if you have any questions or comments by 3/31.

, Katie, and I will be at an internal retreat this Wednesday and unable to attend the Academic Council meeting. Below are bulleted updates for you to share as time permits.

#### *General Updates*

- rpk GROUP will be providing a project introduction and update to the Faculty Senate on April 5<sup>th</sup>. This will also be an opportunity for members of the Faculty Senate to ask questions and provide input.

#### *Academic Data Dashboards*

- The UNCG/rpk Data Team met on 2/23, 3/9, and 3/23.
  - Bi-weekly meetings of the Data team will occur throughout the duration of the project.
- Team members reviewed the scope and objectives of the project and were asked to review data templates provided by rpk.
  - UNCG IR's Department has facilitated the sharing of sample data sets from one semester for review by rpk and Data Team members and as reviewed, complete data sets.
- Provost's website details members of the UNCG/rpk Data Team as well as bi-weekly project updates and project FAQs.
  - <https://innovation.uncg.edu/initiatives/academic-data-dashboards-admin-services-review/>

#### *Administrative Services Review*

- Results from the survey requesting feedback on Administrative Services have been shared with the President's Sustainability Taskforce

Thanks again,  
Mike Daly

# rpk GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

UNCG



# UNC Greensboro Faculty Senate

April 5, 2023

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from mission to market

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# About rpk GROUP

12  
years

Mix of **public,**  
**private, two-year,**  
and **four-year**  
institutions

36 States  
3 Continents

200+

Colleges, Universities,  
Associations, and Foundations

Specializing in **sustainable**  
financial models, strategic  
**platform** creation, and the  
financial model behind  
**mission and equitable**  
student success

# The rpk Way

## Mission, Market, and Margin®

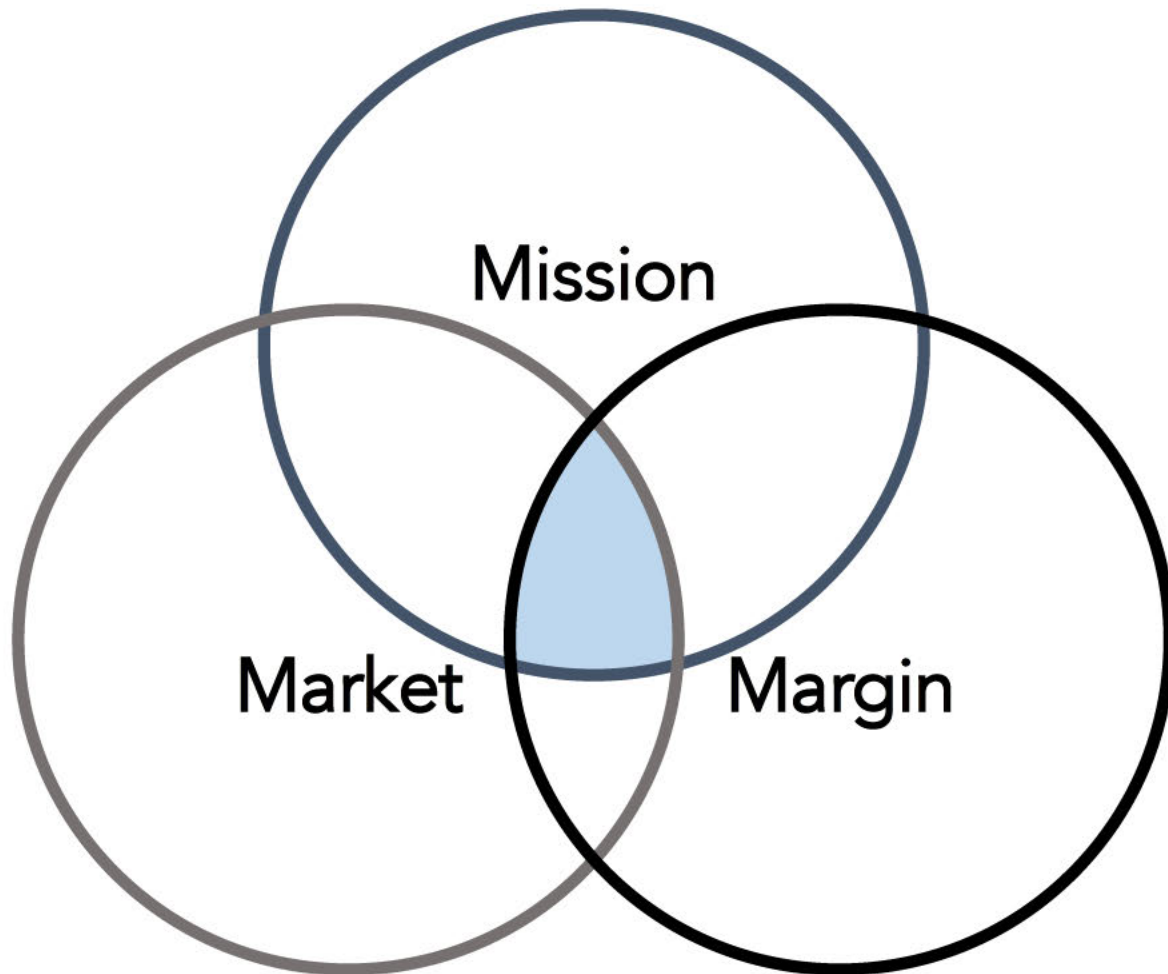
*We help institutions, systems and states live at the intersection of student needs and a sustainable financial model, in order to fulfill strategy and mission.*

**rpk GROUP**  
from mission to market

- 1. Knowledge is our currency and we share it openly.*
- 2. We possess deep domain experience in the academic sphere.*
- 3. Our efforts are grounded in achieving a sustainable financial model.*
- 4. We use data to tell stories that drive progress.*
- 5. We have a bias toward action and help our partners embrace change.*

*Our job isn't done until the work is sustainable.*

# Managing the New Landscape



**Mission** – Where do we excel?

**Market** – What do those we serve need?

**Margin** – How do we create a sustainable model?

# What is rpk's role in supporting UNCG?

Develop Academic  
Data Dashboards

Assess Opportunities  
for Institutional  
Efficiencies & Service  
Improvement

Advise as Requested

## How does rpk engage with UNCG?

- Convenes a data team to support dashboard development, including methodology creation and vetting.
- Attends existing meetings of constituency groups (Deans, Chairs, Faculty Senate Executive Committee, etc.) to provide updates and receive feedback.
- Issued a survey to gather feedback on administrative services.
- Hosts town halls for the entire UNCG community to provide relevant project updates.
- Supports efforts to implement sustainable data practices.

## How does UNCG engage with rpk?

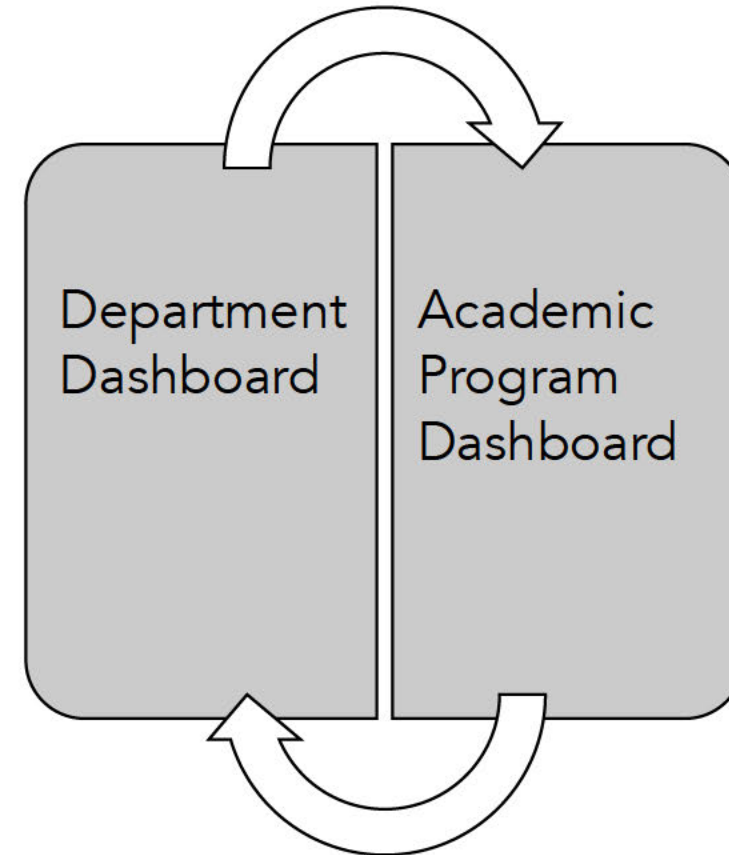
- Project leaders meet bi-weekly with rpk.
- Project site provides regular updates for UNCG community.
- Feedback form on project site offers opportunity to ask questions and request answers.
- Frequently asked questions (FAQ) document on project site offers insights into common inquiries.
- As available, UNCG stakeholders will be asked to review beta dashboards and provide feedback.
- Ask Questions!



# Project Objective #1: Develop Academic Dashboards

rpk is working with UNCG faculty and staff to create dashboards that will support ongoing understanding and decision-making related to academic programs and course offerings.

- Establish and/or confirm data definitions.
  - Years of analysis: 2020-2022
  - Data extracted at end of term
  - Additional definitions will follow UNCG's Data Governance processes
- Create replicable methodologies for collection, validation, and utilization of defined data.
- Position dashboards to prioritize usability and support data-informed decisions.



# Project Objective #1: UNCG/rpk Data Team

- Assistant Controller for Financial Reporting
- Professor, Counseling and Educational Development
- Lead Business Intelligence, Projects, and Reporting
- Professor, Music Education
- HRIS Manager
- Professor, Human Development and Family Studies
- Dean of Undergraduate Studies
- Associate Director of Institutional Research and Enterprise Data Management
- Professor, English
- Assistant Dean for Advising and Student Success
- Finance and Administration Reporting & Visualization



## Project Objective #2: Assess Opportunities for Institutional Efficiencies & Service Improvement

- Conducting interviews, document reviews, and data analysis to identify areas where administrative services can better serve UNCG students, faculty, and staff.
- Providing support to Chancellor's Financial Sustainability Taskforce.

## Project Objective #3: Advise as Requested

- When asked, rpk provides feedback or consultation to the constituencies working on these efforts related to responding to current budget situation
- Structuring learning opportunities as part of the current training for academic leaders.

# Timeline

## Academic Dashboards

January 2023	Kick-off and Data Discovery
February – April 2023	Data Collection and Verification
March – April 2023	Dashboard #1
April – May 2023	Dashboard #2
March – July 2023	Integration with ongoing training program for department heads/chairs/school directors

## Institutional Efficiencies and Service Improvement

February 2023	Kick-off and Data Discovery
March & April 2023	Data Collection and Stakeholder Interviews
May 2023	Data Analysis
June 2023	Report and recommendations

# Questions?



You can always ask questions or submit comments at: <https://forms.office.com/r/RdMqrdwpnj>



# Thank you

Mike Daly  
mdaly@rpkgroup.com

**From:** [Katie Hagan](#)  
**To:** ; [Mike Daly](#)  
**Cc:** [Bob Shea](#)  
**Subject:** Re: UNCG/rpk Draft Deck for 4/5 Presentation to Faculty Senate and notes for Academic Council  
**Date:** Monday, March 27, 2023 5:55:09 PM  
**Attachments:** [Outlook-ju2kv0d3.png](#)

---

Hi ,

We are going to use three years of data (2020, 2021, and 2022). This is due in large part to academic structure changes that happened between 2019 and 2020 that would require a lot of manual work to align 2019 with more recent years. In addition, when going to pull the financial data, the team encountered some challenges with 2019 that would take some time to resolve. Restricting to 2020-2022 will allow us to move more quickly, and 2023 should be able to be added fairly easily in the fall, so you'll have four years of data to inform any work that happens in the fall.

Best,  
Katie

---

**From:**  
**Sent:** Monday, March 27, 2023 5:20 PM  
**To:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Cc:** Bob Shea ; Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Subject:** Re: UNCG/rpk Draft Deck for 4/5 Presentation to Faculty Senate and notes for Academic Council

Thanks Mike,  
I was under the impression we would have four years of data for both dept/program level data. The slide indicates it will only be two years, is that correct? I do not think that is sufficient for trend analysis.

I haven't had a chance to review the notes from the data meetings but can you help me understand why we have restricted it to two years?

Otherwise, looks fine to me. Thanks much!

On Mon, Mar 27, 2023 at 12:15 PM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:

Hi and Bob,

Attached is the draft presentation for the presentation to the Faculty Senate on April 5th. Please note that the timeline (slide 10) for Institutional Efficiencies and Service Improvement has been adjusted to allow time for the Chancellor's Taskforce to complete its work. We are targeting the presentation to the Faculty Senate at 10-12 minutes, leaving 18-20 minutes for discussion. Please review and let me know if you have any questions or comments by 3/31.

Katie, and I will be at an internal retreat this Wednesday and unable to attend the Academic Council meeting. Below are bulleted updates for you to share as time permits.

### *General Updates*

- rpk GROUP will be providing a project introduction and update to the Faculty Senate on April 5<sup>th</sup>. This will also be an opportunity for members of the Faculty Senate to ask questions and provide input.

### *Academic Data Dashboards*

- The UNCG/rpk Data Team met on 2/23, 3/9, and 3/23.
  - Bi-weekly meetings of the Data team will occur throughout the duration of the project.
- Team members reviewed the scope and objectives of the project and were asked to review data templates provided by rpk.
  - UNCG IR's Department has facilitated the sharing of sample data sets from one semester for review by rpk and Data Team members and as reviewed, complete data sets.
- Provost's website details members of the UNCG/rpk Data Team as well as bi-weekly project updates and project FAQs.
  - <https://innovation.uncg.edu/initiatives/academic-data-dashboards-admin-services-review/>

### *Administrative Services Review*

- Results from the survey requesting feedback on Administrative Services have been shared with the President's Sustainability Taskforce

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

**From:** [Mike Daly](#)  
**To:** ; [Katie Hagan](#)  
**Cc:** [Bob Shea](#)  
**Subject:** Re: UNCG/rpk Draft Deck for 4/5 Presentation to Faculty Senate and notes for Academic Council  
**Date:** Monday, March 27, 2023 6:10:50 PM  
**Attachments:** [Outlook-ju2kv0d3.png](#)

---

Hi ,

Thanks for the close read. I'll adjust the slides so they clearly share the academic years being included.

Thanks,  
Mike Daly  
rpk GROUP

Michael Daly | Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: [518-796-2209](tel:518-796-2209)

---

**From:**  
**Sent:** Monday, March 27, 2023 6:01:24 PM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Cc:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>; Bob Shea  
**Subject:** Re: UNCG/rpk Draft Deck for 4/5 Presentation to Faculty Senate and notes for Academic Council

Thanks for the quick response Katie.

On Mon, Mar 27, 2023 at 5:55 PM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Hi

We are going to use three years of data (2020, 2021, and 2022). This is due in large part to academic structure changes that happened between 2019 and 2020 that would require a lot of manual work to align 2019 with more recent years. In addition, when going to pull the financial data, the team encountered some challenges with 2019 that would take some time to resolve. Restricting to 2020-2022 will allow us to move more quickly, and 2023 should be able to be added fairly easily in the fall, so you'll have four years of data to inform any work that happens in the fall.

Best,  
Katie

---

**From:**



**Sent:** Monday, March 27, 2023 5:20 PM

**To:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>

**Cc:** Bob Shea ; Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>

**Subject:** Re: UNCG/rpk Draft Deck for 4/5 Presentation to Faculty Senate and notes for Academic Council

Thanks Mike,

I was under the impression we would have four years of data for both dept/program level data. The slide indicates it will only be two years, is that correct? I do not think that is sufficient for trend analysis.

I haven't had a chance to review the notes from the data meetings but can you help me understand why we have restricted it to two years?

Otherwise, looks fine to me. Thanks much!

On Mon, Mar 27, 2023 at 12:15 PM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:

Hi and Bob,

Attached is the draft presentation for the presentation to the Faculty Senate on April 5th. Please note that the timeline (slide 10) for Institutional Efficiencies and Service Improvement has been adjusted to allow time for the Chancellor's Taskforce to complete its work. We are targeting the presentation to the Faculty Senate at 10-12 minutes, leaving 18-20 minutes for discussion. Please review and let me know if you have any questions or comments by 3/31.

, Katie, and I will be at an internal retreat this Wednesday and unable to attend the Academic Council meeting. Below are bulleted updates for you to share as time permits.

#### *General Updates*

- rpk GROUP will be providing a project introduction and update to the Faculty Senate on April 5<sup>th</sup>. This will also be an opportunity for members of the Faculty Senate to ask questions and provide input.

#### *Academic Data Dashboards*

- The UNCG/rpk Data Team met on 2/23, 3/9, and 3/23.
  - Bi-weekly meetings of the Data team will occur throughout the duration of the project.
- Team members reviewed the scope and objectives of the project and were asked to review data templates provided by rpk.
  - UNCG IR's Department has facilitated the sharing of sample data sets from one semester for review by rpk and Data Team members and as reviewed, complete data sets.
- Provost's website details members of the UNCG/rpk Data Team as well as bi-weekly project updates and project FAQs.

<https://innovation.uncg.edu/initiatives/academic-data-dashboards-admin-services-review/>

*Administrative Services Review*

- Results from the survey requesting feedback on Administrative Services have been shared with the President's Sustainability Taskforce

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

**From:** [Mike Daly](#)  
**To:**  
**Cc:** [Katie Hagan](#); [Bob Shea](#)  
**Subject:** UNCG/rpk Project Response Form  
**Date:** Wednesday, March 29, 2023 2:49:26 PM  
**Attachments:** [Outlook-zfi5qfm.png](#)

---

Hi ,

I wanted to call your attention to this response we received today via the project feedback form. No response was requested nor was contact information supplied. We will not be incorporating this into the website FAQ.

*"Why are you not including a select number of students on the Academic Portfolio Review task force? Do you realize that students are already quite aware of the radical changes that UNCG is currently undergoing and will continue to undergo? UNCG higher administrators need to communicate with the entire university through email about the upcoming structural changes and the factors that have led to this re-structuring? Students need to be informed and they need ample opportunities to respond."*

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Project Tracker  
**Date:** Friday, March 31, 2023 2:16:46 PM  
**Attachments:** [Outlook-p5ryicgi.png](#)  
[UNCG Weekly Project Update 2023.03.30.pdf](#)

---

Hi and Bob,

Attached is the weekly project tracker for your review. , please note that slide 2 provides a summary of decisions made and near decisions to be made by the Data Team. Please let me know if you have any questions.

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

UNCG



# UNCG & rpk GROUP

## Status Report: March 30, 2023

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from mission to market

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# Data Team Update

- Decisions made by Data Team
  - Years of analysis will be AY2020, AY2021, and AY2022
  - The data extraction date for the course, faculty, and academic program data will be the end of the term. This allows for alignment with how the UNC system uses data.
- Decisions being considered by Data Team on 4/6
  - The final list of exclusions from course data. Exclusions are designed to acknowledge course section types that are either pedagogically designed to be small or small in response to available infrastructure. Excluding these course section types ensure that metrics such as average class size and fill rate are representative of what is within UNCG's ability to control.
  - The final list of current, active academic programs that will be included in the academic dashboards

# Project Overview: March 24 - March 30

Overall Status	Project Status Overview & Key Items for Attention	
At Risk	<ul style="list-style-type: none"> <li>Based on availability of academic data a revised timeline is shared on slide 7.</li> </ul>	
Owner(s)	Accomplishments	Upcoming Activities
rpK GROUP	<ul style="list-style-type: none"> <li>Shared draft presentation for April 5 meeting with Faculty Senate</li> <li>Met with Financial Sustainability Task Force on 3/31</li> </ul>	<ul style="list-style-type: none"> <li>Meeting with Faculty Senate Executive Committee (4/3)</li> <li>Project update to Faculty Senate (4/5)</li> <li>UNCG/rpK Data Team meeting (4/6)</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>Reviewed presentation materials for 4/5 meeting with Faculty Senate</li> <li>Researched availability of data related to sponsored research activity</li> <li>Provided responses to questions about role of academic data dashboard in proposed program review process</li> </ul>	<ul style="list-style-type: none"> <li>Sharing academic program and faculty data</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started



# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July									
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31					
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																														
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	Complete	At Risk	At Risk	On Track	On Track																				
Dashboard 1: TBD													At Risk	At Risk	On Track	On Track	On Track	On Track	On Track	On Track	On Track															
Dashboard 2: TBD																		On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	
Faculty Workshops													Complete	Complete	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	

Note: Based on availability of academic data a revised timeline has been generated and is available on slide 7.

Key	Complete	On Track	At Risk	Off Track	Not Started
	Complete	On Track	At Risk	Off Track	Not Started

# Timeline – Administrative Services Review

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk																		
Final Report & Recommendations																At Risk	At Risk	At Risk	At Risk	At Risk	At Risk										

Note: rpk is providing support for the Chancellor’s Task Force on Financial Responsibility in place of what was originally scoped for the administrative services review. Katie is continuing to attend those meetings and engaging when asked (e.g., distributing and analyzing the stakeholder feedback survey). Stakeholder interviews and additional analysis and report drafting will be on hold until the Task Force work advances and rpk has a better idea of how to best add value.

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Status Meeting (monthly)	[Redacted] Rick Staisloff	4/18, 930am 5/15, 12:30pm	-
Project Leaders Meeting (bi-weekly)	[Redacted] Bob, Katie, and Mike	4/12, 9:00am	Review project tracker
Faculty Senate Executive Council	Mike and Executive Committee	4/3, 11:30am	-
Faculty Senate	Katie, Mike and Faculty Senate	4/5, 3:00pm	-
UNCG/rpk Data Team Meting	Mike and Data Team	4/6, 10am	-

# Revised Timeline – Academic Data/Dashboards

Data	All Data Collected	Definitions and Methodology Confirmed	Data Validated	Beta Dashboard Launch and Feedback Period	Beta Dashboard Refined Based on Feedback
Academic Program List	3/24	4/6	4/7	4/28 – 5/12	5/19
Academic Structure	4/7	4/13	N/A	4/28 – 5/12	5/19
Course Data	3/24	4/6	4/14	4/28 – 5/12	5/19
Instructor Data	3/31	4/13	4/21	4/28 – 5/12	5/19
Faculty Data*	3/31	4/13	4/21	4/28 – 5/12	5/19
Academic Program Data#	3/31	4/6	4/14	4/28 – 5/12	5/19
Finance Data	3/24	4/6	4/28	TBD	TBD

\*Dependent on new data queries being structured and tested

#Sample data has not been shared

Key	Complete	On Track	At Risk	Off Track	Not Started

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from mission to market



# Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk GROUP Weekly Project Update and Bi-Weekly Update for Project Site  
**Date:** Friday, April 7, 2023 9:38:05 AM  
**Attachments:** [Outlook-gjg12mwl.png](#)  
[UNCG Weekly Project Update 2023.04.06.pdf](#)  
[UNCG rpk Project Update for Website 2023.04.06.docx](#)

---

Hi [redacted] and Bob,

Attached please find the weekly project tracker. [redacted], this reflects our conversation on Thursday regarding a sequenced sharing of the academic data dashboards.

Also attached for your review, [redacted], is a bi-weekly project update for sharing on the project site.

I am also noting that the Provost's Council meeting on 4/12 conflicts with our project leaders meeting. I'll work with your staff to reschedule the latter.

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

UNCG



# UNCG & rpk GROUP

## Status Report: April 6, 2023

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# Data Team Update

- Decisions made by Data Team
  - Course section types included for median section size will be those categorized as 'organized class course' by UNC System:
    - Lab, Lecture, Lecture & Lab, Recitations, Seminar, and Studio
  - Years of analysis will be AY2020, AY2021, and AY2022.
  - The data extraction date for the course, faculty, and academic program data will be the end of the term. This allows for alignment with how the UNC system uses data.
- Decisions being considered by Data Team on 4/13
  - The final list of current, active academic programs that will be included in the academic dashboards.
  - Methodology for median section size for cross-listed/combined sections.
  - Methodology for generating competitor list.

# Project Overview: March 31 – April 6

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>• Provided project introduction and presentation to Faculty Senate (4/5)</li> <li>• Facilitated UNCG/rpk Data Team meeting (4/6)</li> <li>• Finalizing course date for inclusion into academic dashboard (4/11)</li> <li>• Meeting with UNCG Finance team to review allocations (4/10)</li> <li>• Agreed on approach for sharing dashboards for feedback</li> <li>• Katie attended HR subcommittee for Financial Sustainability task force (4/5)</li> </ul>	<ul style="list-style-type: none"> <li>• Meeting with Department Heads, Chairs and Program Directors (4/10)</li> <li>• Meeting with UNCG IR Heads to review dashboard design against draft Academic Program Review metrics and process for competitor list (4/10)</li> <li>• Finalizing draft dashboard for review by project leaders and Data Team</li> <li>• UNCG/rpk Data Team meeting (4/13)</li> <li>• Scheduling meetings with Deans to inform financial analysis</li> <li>• Financial Sustainability Task Force meeting (4/14)</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>• Provided matrix of draft Academic Program Review metrics</li> <li>• Shared sample academic program data</li> <li>• Shared sample faculty data</li> <li>• Agreed on approach for sharing dashboards for feedback</li> </ul>	<ul style="list-style-type: none"> <li>• Sharing complete Academic Program data</li> <li>• Sharing complete Faculty data</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	On Track	On Track	On Track	On Track	On Track															
Dashboard Development																On Track	On Track	On Track	On Track	On Track	On Track										
Dashboards Shared with Deans																						On Track	On Track	On Track							
Dashboards Shared with Chairs																							On Track	On Track	On Track						
Dashboards Shared with Taskforce																								On Track	On Track	On Track					
Faculty Workshops										Complete	Complete	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track		



# Timeline – Administrative Services Review

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk																		
Final Report & Recommendations																Not Started	Not Started	Not Started	Not Started	Not Started	Not Started										

Note: rpk is providing support for the Chancellor’s Task Force on Financial Responsibility in place of what was originally scoped for the administrative services review. Katie is continuing to attend those meetings and engaging when asked (e.g., distributing and analyzing the stakeholder feedback survey). Stakeholder interviews and additional analysis and report drafting will be on hold until the Task Force work advances and rpk has a better idea of how to best add value.

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Status Meeting (monthly)	[REDACTED] Rick Staisloff	4/18, 930am 5/15, 12:30pm	-
Academic Data Dashboard Town Hall	UNCG and rpk	5/2, 12:30pm	-
Project Leaders Meeting (bi-weekly)	[REDACTED] Bob, Katie, and Mike	4/12, 9:00am	Review project tracker
Undergraduate Department Heads, Chairs, and Program Directors	Mike and Committee	4/10, 9:00am	-
UNCG IR Leaders	Mike and UNCG IR	4/10, 3:00pm	-
UNCG Finance Team	rpk and Finance Team	4/10, TBD	-
Chancellor's Task Force on Financial Sustainability	Katie	4/14, 10am-12pm (in person)	



# Revised Timeline – Academic Data/Dashboards

Data	All Data Collected	Definitions and Methodology Confirmed	Data Validated	Beta Dashboard Launch and Feedback Period	Beta Dashboard Refined Based on Feedback
Academic Program List	3/24	4/13	4/14	6/5 – 6/30	7/3-7
Academic Structure	4/7	4/13	N/A		
Course Data	3/24	4/13	4/21		
Instructor Data	3/31	4/21	5/5		
Faculty Data	4/14	4/21	5/5		
Academic Program Data	4/14	4/21	5/5		
Finance Data	3/24	4/6	5/5	TBD	TBD

Key	Complete	On Track	At Risk	Off Track	Not Started

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from mission to market

# Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)



**University North Carolina Greensboro  
Academic Data Dashboards  
Project Update  
April 6, 2023**

Since the last project update on March 23, 2023, rpk GROUP (rpk) has continued to engage multiple stakeholder groups with project updates.

The Data Team has continued to meet regularly and has confirmed that the dashboard will initially include academic years 2019-2020, 2020-2021, and 2021-2022. Data for course, faculty, and academic programs will be extracted from the end of each term within those years.

rpk provided a project introduction and update to the Faculty Senate on April 5, 2023. A copy of that presentation is [available on the Provost's website](#).

The UNCG community is encouraged to submit questions or comments regarding the project can be directed directly to Mike Daly at [mdaly@group.com](mailto:mdaly@group.com) or through [the project's feedback form](#).

rpk GROUP

**From:** [Mike Daly](#)  
**To:** [Bob Shea](#); [Katie Hagan](#)  
**Cc:**  
**Subject:** Canceled: UNCG Project Leaders Meeting  
**Importance:** High

---

Caution: This email originated from outside of UNCG. Do not click links or open attachments unless you recognize the sender.

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#);  
**Subject:** On Campus Tomorrow  
**Date:** Thursday, April 13, 2023 11:07:45 AM

---

**Caution:** This email originated from outside of UNCG. Do not click links or open attachments unless you recognize the sender.

Hi Bob and ,

I'll be on campus tomorrow from 10am-12pm for the Chancellor's Task Force. I can come in earlier or stay a little later (just need to be heading back to Durham by 1:30), if there is anything you'd like to meet about.

Best,  
Katie

**rp**k GROUP  
from mission to market

Katie Hagan | Principal | [rp](#)k GROUP  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
khagan@rpkgroup.com | 757-589-0490

**From:**  
**To:** [Katie Hagan](#)  
**Cc:** [Bob Shea](#)  
**Subject:** Re: On Campus Tomorrow  
**Date:** Thursday, April 13, 2023 11:09:44 AM

---

I'm out tomorrow Katie - could you bring some examples of rubrics for my review and so I can share with the task force?  
Thanks much!

On Thu, Apr 13, 2023 at 11:07 AM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Hi Bob and ,

I'll be on campus tomorrow from 10am-12pm for the Chancellor's Task Force. I can come in earlier or stay a little later (just need to be heading back to Durham by 1:30), if there is anything you'd like to meet about.

Best,  
Katie

**rpk** GROUP  
from mission to market

Katie Hagan | Principal | [rpkgroup.com](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com) | 757-589-0490

**From:** [Katie Hagan](#)  
**To:**  
**Cc:** [Bob Shea](#)  
**Subject:** Re: On Campus Tomorrow  
**Date:** Thursday, April 13, 2023 11:44:57 AM

---

**Caution:** This email originated from outside of UNCG. Do not click links or open attachments unless you recognize the sender.

Enjoy your time away! Mike is working on some things for you re: the rubrics and I believe planning to send today. What he'll share is basically a compilation of what we've seen across the places we've worked with institutions on similar efforts. The reality is that these processes are not always public (typically handled behind a single sign on at most institutions) so there are relatively few public links to other processes to share. What most institutions have are a list of data points and a process outlined (e.g., task force reviews data and makes recommendations to the provost, provost makes recommendations to the chancellor, etc.) -- essentially what you've already created. The rubric stage is skipped due to the aversion to assigning a 'score' or 'rating' to programs and a desire to maintain some level of flexibility in the process to allow for qualitative input and mission prioritization.

I think our work in Vermont is among one of the only public frameworks for program decisions (p. 9), but I don't know that I'd classify it as a rubric: <https://www.vsc.edu/wp-content/uploads/2021/06/rpk-GROUP-Final-Report-to-the-Vermont-State-Colleges-System-Final-Version-REVISED-6-3-21.pdf>

---

**From:**  
**Sent:** Thursday, April 13, 2023 11:09 AM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Cc:** Bob Shea  
**Subject:** Re: On Campus Tomorrow

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Thanks much!

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Best,  
Katie

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Katie Hagan | Principal | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com) | 757-589-0490

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Update and sample rubrics for Portfolio Review Taskforce  
**Date:** Thursday, April 13, 2023 2:23:31 PM  
**Attachments:** [Outlook-cwnui5cr.png](#)  
[Sample Rubrics for UNCG 2023.04.13.docx](#)  
[UNCG Weekly Project Update 2023.04.13.pdf](#)

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**Caution:** This email originated from outside of UNCG. Do not click links or open attachments unless you recognize the sender.

Hi [redacted] and Bob,

Attached is the weekly progress report for your review. Please let me know if you have any questions. [redacted] the final [academic program list referenced is available for review here.](#)

Also attached [redacted], are some sample rubrics for you to consider sharing with the PRTF. As Katie mentioned in another email there are very few such resources publicly available.

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209



UNCG



# UNCG & rpk GROUP

## Status Report: April 13, 2023

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# Data Team Update

- Decisions made by Data Team
  - Years of analysis will be AY2020, AY2021, and AY2022.
  - The data extraction date for the course, faculty, and academic program data will be the end of the term. This allows for alignment with how the UNC system uses data.
  - Class types included for median class size will be those categorized as 'organized class course' by UNC System:
    - Lab, Lecture, Lecture & Lab, Recitations, Seminar, and Studio
  - For combined classes, the following methodology will be applied to assign median class size when two or more departments are combined
    - Unequal enrollment – class with highest enrollment is assigned median class size
    - Equal enrollment – excluded in recognition of UNCG moving to install practice of assigning primary class (11 instances)
- Decisions being considered by Data Team on 4/20
  - The final list of current, active academic programs that will be included in the academic dashboards; responses requested by 4/18
  - Categories of faculty types present in dashboards

# Project Overview: March 7 – April 13

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>Initiated meetings with Academic Deans to review approach to direct net revenue analysis</li> <li>Met with Department Heads (4/10), Provost's Council (4/12), and Graduate Program Directors (4/12)</li> <li>Finalized draft dashboard outline for sharing with Data Team and project leaders (see slides 4-5)</li> <li>Finalized methodology for median class size with Data Team</li> <li>Katie presented project update to Staff Senate (4/13)</li> <li>Mike shared rubrics/approaches to support Provost's Program Review Taskforce</li> </ul>	<ul style="list-style-type: none"> <li>Meeting with UNCG IR Heads to review dashboard design against draft Academic Program Review metrics and process for loss-market list (4/14, rescheduled)</li> <li>Katie attending Financial Sustainability Task Force meeting (4/14)</li> <li>Sharing draft presentation for 5/2 town hall with project leaders</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>Shared complete instructor and faculty data</li> <li>Invited UNCG community to town hall on 5/2</li> </ul>	<ul style="list-style-type: none"> <li>Reviewing draft presentation for 5/2 town hall</li> <li>Reviewing shared draft outline for workshops with chairs )</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started

# UNCG Academic Dashboard Draft Layout

**SUMMARY (Page 1):** High-Level Compilation of Essential Metric Intended to Support On-going Institutional Reviews

- Academic Program Enrollment Distribution
- Academic Program Enrollment Headcount(s)/Growth
- All Student Credit Hours
- Median Class Size
- Student Credit Hours per Faculty FTE

# UNCG Academic Dashboard Draft Layout

**DEPARTMENT (Page 2):** Collection of “zoomed-in” metric visuals necessary to inform data-drive decisions related to department-level activity and resource utilization over time

- All Student Credit Hours
- Median Class Size
- Student Credit Hours per Faculty FTE
- Faculty FTE by Type

*Slicers/Filters Included: College, Department, Year*

**PROGRAM (Page 3):** Collection of “zoomed-in” metric visuals necessary to inform data-driven decisions and assess outcomes related to academic program activity and student success

- Summary Matrix
- Demand/Yield
- Average Duplication Headcount
- Retention (Program and Institution)
- Graduation
- Time to Degree
- Excess Credits to Degree

*Slicers/Filters Included: College, Year, Department, Program Name, Student Level, Student Type, Race/Ethnicity*

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	On Track	On Track	On Track														
Dashboard Development																On Track	On Track	On Track	On Track	On Track	On Track										
Dashboards Shared with Deans																							On Track	On Track	On Track						
Dashboards Shared with Chairs																								On Track	On Track	On Track					
Dashboards Shared with Taskforce																									On Track	On Track	On Track				
Faculty Workshops										Complete	Complete	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May					June				July					
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31	
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																										
Data Collection & Verification						Complete	Complete	Complete	Complete																							
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk																			
Final Report & Recommendations																Not Started	Not Started	Not Started	Not Started	Not Started	Not Started											

Note: rpk is providing support for the Chancellor's Task Force on Financial Responsibility in place of what was originally scoped for the administrative services review. Katie is continuing to attend those meetings and engaging when asked (e.g., distributing and analyzing the stakeholder feedback survey). Stakeholder interviews and additional analysis and report drafting will be on hold until the Task Force work advances and rpk has a better idea of how to best add value.

Key	Complete	On Track	At Risk	Off Track	Not Started
	Complete	On Track	At Risk	Off Track	Not Started



# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Status Meeting (monthly)	[Redacted] Rick Staisloff	5/15, 12:30pm	-
Academic Data Dashboard Town Hall	UNCG and rpk	5/2, 12:30pm	-
Project Leaders Meeting (bi-weekly)	[Redacted] Bob, Katie, and Mike	4/26, 12n	Review project tracker
UNCG IR Leaders	Mike, UNCG IR, and [Redacted] [Redacted]	4/14, 3:00pm	-
Chancellor's Task Force on Financial Sustainability	Katie	4/14, 10am-12pm (in person)	
Data Stewards	Mike and Committee	4/17, 1pm	-
UNCG/rpk Data Team	UNCG and rpk	4/20, 10am	

# Revised Timeline – Academic Data/Dashboards

Data	All Data Collected	Definitions and Methodology Confirmed	Data Validated	Beta Dashboard Launch and Feedback Period	Beta Dashboard Refined Based on Feedback
Academic Program List	3/24	4/18	4/19	6/5 – 6/30	7/3-7
Academic Structure	4/7	4/21	N/A		
Course Data	3/24	4/13	4/21		
Instructor Data	3/31	4/21	5/5		
Faculty Data	4/14	4/21	5/5		
Academic Program Data	4/14	4/21	5/5		
Finance Data	3/24	4/21	5/5	TBD	TBD

Key	Complete	On Track	At Risk	Off Track	Not Started

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from mission to market

Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

### Sample Program Rubric A

This approach aims to develop cut scores for metrics (only a few metrics shown here, but could be expanded to include others), and programs are then categorized based on where they fall within the cut scores for the various metrics. This approach attempts to reduce the categorization to more of a math problem and remove as much subjectivity as possible but does present challenges with including qualitative measures that cannot be distilled as succinctly.

	Program Headcount	Program Growth	Degree Production	Other
<b>Sunset</b>	Fewer than 30	Declining or single digit-growth (3-year average)	Degree production below 10 (3-year average)	
<b>Monitor</b>	Fewer than 60	Declining or single digit-growth (3-year average)	Degree production below 20 (3-yr average)	All new programs

### Sample Program Rubric B

This approach does not set cut scores for metrics but allows the reviewers to look across all metrics and determine the appropriate placement of the program relative to the performance. This approach allows for some grey area and flexibility but puts reviewers in positions to make difficult decisions about the categorization because there are fewer 'rules' to fall back on.

	Definition	Metrics
<b>Grow</b>	A program with high student enrollment and/or demand and/or an area of emerging growth.	<ul style="list-style-type: none"> <li>• Low enrollment, defined as fewer than 10 students;</li> <li>• Declining enrollment for the previous four years;</li> <li>• Declining number of degrees or credentials conferred for the previous four years;</li> <li>• Low regional student demand, defined as 40th percentile or lower according to data;</li> <li>• Low regional market demand defined as 40th percentile or lower</li> </ul>
<b>Sustain</b>	A program that is performing well and the outlook is positive.	
<b>Fix</b>	A previously strong program that can be turned around.	
<b>Sunset</b>	Small or specialized programs with unfavorable student/market demand and limited growth potential.	



**From:**  
**To:** [Mike Daly](#)  
**Cc:** [Bob Shea](#); [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Update and sample rubrics for Portfolio Review Taskforce  
**Date:** Friday, April 14, 2023 6:54:31 AM  
**Attachments:** [Outlook-cwnui5cr.png](#)

---

Thanks Mike,  
I'll share the sample rubrics with the task force. I'm surprised there aren't others....I'll look at the link that Katie provided.

Best,

On Thu, Apr 13, 2023 at 2:21 PM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:

Hi \_\_\_\_\_ and Bob,

Attached is the weekly progress report for your review. Please let me know if you have any questions. \_\_\_\_\_, the final [academic program list referenced is available for review here.](#)

Also attached \_\_\_\_\_, are some sample rubrics for you to consider sharing with the PRTF. As Katie mentioned in another email there are very few such resources publicly available.

Thanks again,  
Mike Daly

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from mission to market

Michael Daly | Senior Associate | [rp](#)k GROUP

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

**From:** [Mike Daly](#)  
**To:**  
**Cc:** [Bob Shea](#); [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Update and sample rubrics for Portfolio Review Taskforce  
**Date:** Friday, April 14, 2023 9:21:11 AM  
**Attachments:** [Outlook-cwnui5cr.png](#)

---

**Caution:** This email originated from outside of UNCG. Do not click links or open attachments unless you recognize the sender.

Thanks, Yes unfortunately, there aren't many others that are publicly available. This is partly due to the sensitive nature of these decisions and the rubrics being behind single-sign-on walls. It is also partly due to the fact that higher education has traditionally not stopped doing things, and there aren't many instances of the hard work of program review, outside of assessment, being done.

The first rubric that we shared is from work that [rpk GROUP did with the Vermont State College System](#).

The second rubric that we shared, because it was publicly available, is work [Kentucky's Council on Postsecondary Education is doing with some of its institutions](#).

If and as I encounter more rubrics that are available to share, I'll pass them along.

Have a great weekend,

Mike Daly

rpk GROUP

---

**From:**  
**Sent:** Friday, April 14, 2023 6:54 AM  
**To:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Cc:** Bob Shea ; Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Subject:** Re: UNCG/rpk Weekly Update and sample rubrics for Portfolio Review Taskforce

Thanks Mike,  
I'll share the sample rubrics with the task force. I'm surprised there aren't others....I'll look at the link that Katie provided.

Best,

On Thu, Apr 13, 2023 at 2:21 PM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:

Hi and Bob,

Attached is the weekly progress report for your review. Please let me know if you have any questions. the final [academic program list referenced is available for review here](#).

Also attached , are some sample rubrics for you to consider sharing with the PRTF. As Katie mentioned in another email there are very few such resources publicly available.

Thanks again,  
Mike Daly

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Michael Daly | Senior Associate | [rp](#)k GROUP

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[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209



**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Stakeholder Engagements for week of 4/24  
**Date:** Tuesday, April 18, 2023 10:45:47 AM  
**Attachments:** [Outlook-h5cgvqiq.png](#)

---

**Caution:** This email originated from outside of UNCG. Do not click links or open attachments unless you recognize the sender.

Hi and Bob,

Katie and I are both traveling at various times next week, so I wanted to update you regarding the approach that we'll be taking next week for scheduled meetings with stakeholders.

4/26

Academic Council Meeting - a written update will be supplied by rpk  
Project Leaders Meeting - Katie will be meeting with you and Bob  
Data Trustees Meeting - a written update was already shared by rpk  
Undergraduate Studies Council - a written update will be supplied by rpk

4/27

Assistant Deans' Council - Mike will attend and provide an update

Please let me know if you have any questions or concerns.

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

**From:**  
**To:** [Mike Daly](#)  
**Cc:** [Bob Shea](#); [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Stakeholder Engagements for week of 4/24  
**Date:** Tuesday, April 18, 2023 12:08:52 PM  
**Attachments:** [Outlook-h5cgvqiq.png](#)

---

Thanks to you both,

On Tue, Apr 18, 2023 at 10:45 AM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:

Hi           and Bob,

Katie and I are both traveling at various times next week, so I wanted to update you regarding the approach that we'll be taking next week for scheduled meetings with stakeholders.

4/26

Academic Council Meeting - a written update will be supplied by rpk  
Project Leaders Meeting - Katie will be meeting with you and Bob  
Data Trustees Meeting - a written update was already shared by rpk  
Undergraduate Studies Council - a written update will be supplied by rpk

4/27

Assistant Deans' Council - Mike will attend and provide an update

Please let me know if you have any questions or concerns.

Thanks again,  
Mike Daly

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Michael Daly | Senior Associate | [rp](#)k GROUP

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Progress Update and Communication for Project Site  
**Date:** Thursday, April 20, 2023 3:12:48 PM  
**Attachments:** [Outlook-ibk2c1k5.png](#)  
[UNCG Weekly Project Update 2023.04.20.pdf](#)  
[UNCG rpk Project Update for Website 2023.04.20.docx](#)

---

**Caution:** This email originated from outside of UNCG. Do not click links or open attachments unless you recognize the sender.

Hi [redacted] and Bob,

Attached is the weekly project update for your review. Also attached is a draft language for our bi-weekly update to the project's site.

[redacted], please note in the update the decision that we've reached regarding not bringing forward the metric of excess credits to degrees in the dashboards. The current discrepancies in UNCG's data related to program credits made our anticipated approach invalid. While UNCG's IR team is working to identify the data errors (it resides outside of their purview), work remains for establishing protocols related to regularly updating these data and confirming processes to bring those updates into IR's realm. I'll note that this is the issue [redacted] referenced in an email to us earlier today. Please let Katie or me know if you want to discuss this in more detail prior to our check-in next Wednesday.

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

UNCG



# UNCG & rpk GROUP

## Status Report: April 20, 2023

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from mission to market

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# Data Team Update

- Decisions made by Data Team
  - Years of analysis will be AY2020, AY2021, and AY2022.
  - The data extraction date for the course, faculty, and academic program data will be the end of the term. This allows for alignment with how the UNC system uses data.
  - Class types included for median class size will be those categorized as 'organized class course' by UNC System:
    - Lab, Lecture, Lecture & Lab, Recitations, Seminar, and Studio
  - For combined classes, the following methodology will be applied to assign median class size when two or more departments are combined:
    - Unequal enrollment – class with highest enrollment is assigned median class size.
    - Equal enrollment – excluded in recognition of UNCG moving to install practice of assigning primary class (11 instances).
  - **Based on lack of consistent data regarding program credits, the metric of excess credits to degree will not be present in the dashboards.**
- Decisions being considered by Data Team
  - The final list of current, active academic programs that will be included in the academic dashboards; review continues.
  - Potential utilization of UNCG's Instructional Activity Report (IAR) to inform faculty metrics.

# Project Overview: March 14 – April 20

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpK GROUP	<ul style="list-style-type: none"> <li>• Rick Staisloff met with (4/18).</li> <li>• Katie attended Financial Sustainability Task Force meeting (4/14).</li> <li>• Confirmed approach with UNCG IR to use National Clearinghouse (NCS) data to generate loss-market opportunities from first-time and transfer students who opt-out of UNCG experience.</li> <li>• Mike met with director of Entrepreneurship program to review course credit questions (4/19).</li> <li>• Katie and Raven continued meeting with Academic Deans to review approach to direct net revenue analysis.</li> <li>• Shared project updates with Data Stewards and Data Trustees.</li> <li>• Completed integration of draft course data into draft dashboard. This will inform these metrics: total student credit hours, median class size, and student credit hours per faculty FTE.</li> <li>• Facilitated Data Team meeting (4/20).</li> </ul>	<ul style="list-style-type: none"> <li>• Confirming final academic program list with Data Team.</li> <li>• Reviewing UNCG's Instructional Activity Report (IAR) methodology and results.</li> <li>• Sending written project updates to Academic Council, Undergraduate Studies Council, and Associate/Assistant Deans (meeting canceled by UNCG).</li> <li>• Coordinating with UNCG IR to produce data from NCS for loss-market data.</li> <li>• Sharing draft presentation for 5/2 town hall with project leaders.</li> <li>• Katie attending Chancellor's Task Force on 4/28</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>• Data Team provided significant comments regarding academic program list and program credits.</li> <li>• Sharing Instructional Activity Report and methodology.</li> <li>• Shared timeline of listening tours for Provost's Task Force.</li> </ul>	<ul style="list-style-type: none"> <li>• Reviewing draft presentation for 5/2 town hall.</li> <li>• Reviewing shared draft outline for workshops with chairs</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started



# UNCG Academic Dashboard Draft Layout

**SUMMARY (Page 1):** High-Level Compilation of Essential Metric Intended to Support On-going Institutional Reviews

- Academic Program Enrollment Distribution
- Academic Program Enrollment Headcount(s)/Growth
- All Student Credit Hours
- Median Class Size
- Student Credit Hours per Faculty FTE
- Faculty FTE by Type

Added 4.18.23



# UNCG Academic Dashboard Draft Layout

**DEPARTMENT (Page 2):** Collection of “zoomed-in” metric visuals necessary to inform data-drive decisions related to department-level activity and resource utilization over time

- All Student Credit Hours
- Median Class Size
- Student Credit Hours per Faculty FTE
- Faculty FTE by Type

*Slicers/Filters Included: College, Department, Year*

**PROGRAM (Page 3):** Collection of “zoomed-in” metric visuals necessary to inform data-driven decisions and assess outcomes related to academic program activity and student success

- Summary Matrix
- Demand/Yield
- Average Duplication Headcount
- Retention (Program and Institution)
- Graduation
- Time to Degree
- ~~Excess Credits to Degree~~

*Slicers/Filters Included: College, Year, Department, Program Name, Student Level, Student Type, Race/Ethnicity*

~~Removed 4.20.23~~

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	On Track	On Track	On Track														
Dashboard Development															On Track	On Track		On Track	On Track	On Track	On Track	On Track									
Dashboards Shared with Deans																							On Track	On Track	On Track						
Dashboards Shared with Chairs																								On Track	On Track	On Track					
Dashboards Shared with Taskforce																									On Track	On Track	On Track				
Faculty Workshops										Complete	Complete	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May				June				July					
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk														
Final Report & Recommendations																				Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started

Note: rpk is providing support for the Chancellor's Task Force on Financial Responsibility in place of what was originally scoped for the administrative services review. Katie is continuing to attend those meetings and engaging when asked (e.g., distributing and analyzing the stakeholder feedback survey). Stakeholder interviews and additional analysis and report drafting will be on hold until the Task Force work advances and rpk has a better idea of how to best add value.

Task Force will share final recommendations with the Chancellor on May 22, and from there the remaining work of rpk will be determined.

Key	Complete	On Track	At Risk	Off Track	Not Started
	Complete	On Track	At Risk	Off Track	Not Started

# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Status Meeting (monthly)	[REDACTED] Rick Staisloff	5/15, 12:30pm	-
Academic Data Dashboard Town Hall	UNCG and rpk	5/2, 12:30pm	Review draft presentation shared by rpk (sharing 4/24)
Project Leaders Meeting (bi-weekly)	[REDACTED] Bob, Katie, and Mike	4/26, 12n	Review project tracker
Academic Council	rpk and Council	4/26; 9am	Providing written update
Undergraduate Council	rpk and Council	4/26; 2pm	Providing written update
Associate and Assistant Deans	rpk and Deans	4/27; 2pm	UNCG canceled meeting, rpk providing written update



# Revised Timeline – Academic Data/Dashboards

Data	All Data Collected	Definitions and Methodology Confirmed	Data Validated	Beta Dashboard Launch and Feedback Period	Beta Dashboard Refined Based on Feedback
Academic Program List	3/24	4/18	4/27	6/5 – 6/30	7/3-7
Academic Structure	4/7	4/21	N/A		
Course Data	3/24	4/13	4/21		
Instructor Data	3/31	4/21	5/5		
Faculty Data	4/14	4/21	5/5		
Academic Program Data	4/14	4/21	5/5		
Finance Data	3/24	4/21	5/5	TBD	TBD

Key	Complete	On Track	At Risk	Off Track	Not Started

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rpk GROUP  
from mission to market

Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**University North Carolina Greensboro  
Academic Data Dashboards  
Project Update  
April 21, 2023**

Since the last project update on April 6, 2023, rpk GROUP (rpk) has continued to engage multiple stakeholder groups with project updates.

The Data Team has continued to meet regularly and has confirmed that the dashboard will initially include academic years 2019-2020, 2020-2021, and 2021-2022. The Data Team has confirmed methodology for median class sizes that are defined by the UNC System as 'organized class courses.' The Data Team has confirmed that current data structures do not allow for an accurate representation of excess credits to degree and that metric will not be present in the academic data dashboards.

rpk will provide a project update to the UNCG community on May 2<sup>nd</sup>. This virtual town hall will preview the elements and defined metrics in the academic dashboards and discuss the next steps. Attendees will also have the opportunity to ask questions and provide feedback.

The UNCG community is encouraged to submit questions or comments regarding the project can be directed directly to Mike Daly at [mdaly@group.com](mailto:mdaly@group.com) or through [the project's feedback form](#).

rpk GROUP



**From:**  
**To:** [Mike Daly](#)  
**Cc:** [Bob Shea](#); [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Progress Update and Communication for Project Site  
**Date:** Thursday, April 20, 2023 3:55:26 PM  
**Attachments:** [Outlook-ibk2c1k5.png](#)

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Does this include at the graduate level? This is data the grad school was going to pull.

On Thu, Apr 20, 2023 at 3:09 PM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:

Hi \_\_\_\_\_ and Bob,

Attached is the weekly project update for your review. Also attached is a draft language for our bi-weekly update to the project's site.

please note in the update the decision that we've reached regarding not bringing forward the metric of excess credits to degrees in the dashboards. The current discrepancies in UNCG's data related to program credits made our anticipated approach invalid. While UNCG's IR team is working to identify the data errors (it resides outside of their purview), work remains for establishing protocols related to regularly updating these data and confirming processes to bring those updates into IR's realm. I'll note that this is the issue \_\_\_\_\_ referenced in an email to us earlier today. Please let Katie or me know if you want to discuss this in more detail prior to our check-in next Wednesday.

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

**From:** [Mike Daly](#)  
**To:**  
**Cc:** [Bob Shea](#); [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Progress Update and Communication for Project Site  
**Date:** Thursday, April 20, 2023 4:42:30 PM  
**Attachments:** [Outlook-ibk2c1k5.png](#)

---

**Caution:** This email originated from outside of UNCG. Do not click links or open attachments unless you recognize the sender.

Hi \_\_\_\_\_,

Yes, our review of the two data tables in Banner for undergraduate and graduate degrees and certificates established significant inconsistencies in required program credit hours.

The Data Team was a great partner in helping us review the data with a UNCG lens.

Thanks,

Mike Daly  
rpk GROUP

Michael Daly | Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: [518-796-2209](tel:518-796-2209)

---

**From:**  
**Sent:** Thursday, April 20, 2023, 3:55 PM  
**To:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Cc:** Bob Shea \_\_\_\_\_; Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Subject:** Re: UNCG/rpk Weekly Progress Update and Communication for Project Site

Does this include at the graduate level? This is data the grad school was going to pull.

On Thu, Apr 20, 2023 at 3:09 PM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:

Hi \_\_\_\_\_ and Bob,

Attached is the weekly project update for your review. Also attached is a draft language for our bi-weekly update to the project's site.

\_\_\_\_\_ please note in the update the decision that we've reached regarding not bringing forward the metric of excess credits to degrees in the dashboards. The current discrepancies in UNCG's data related to program credits made our anticipated approach invalid. While UNCG's IR team is working to identify the data errors (it resides outside of their purview), work remains for

establishing protocols related to regularly updating these data and confirming processes to bring those updates into IR's realm. I'll note that this is the issue referenced in an email to us earlier today. Please let Katie or me know if you want to discuss this in more detail prior to our check-in next Wednesday.

Thanks again,

Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#);  
**Cc:** [Raven Moody](#);  
**Subject:** Meet to discuss rpk financial analysis  
**Date:** Monday, April 24, 2023 8:00:24 AM

---

**Caution:** This email originated from outside of UNCG. Do not click links or open attachments unless you recognize the sender.

Hi Bob and ,

I hope all is well. We are making good progress on the financial analysis by academic department, but want to run a couple of things by the two of you. Do you have any availability the week of May 1 for a 30-minute virtual meeting? Below is what works on our end:

5/1: 2-3pm

5/2: 4-5pm

5/3: 11am-1pm, 4-5pm

5/4: 3-5pm

Thanks so much,  
Katie

**rpk** GROUP  
from mission to market

Katie Hagan | Principal | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Fw: UNCG/rpk - Review Requested for 5/2 Town Hall Presentation  
**Date:** Wednesday, April 26, 2023 12:57:05 PM  
**Attachments:** [Outlook-hkiklvn5.png](#)  
[UNCG rpk Town Hall for Academic Data Dashboard 2023.05.02 Draft for Review.pdf](#)

---

**Caution:** This email originated from outside of UNCG. Do not click links or open attachments unless you recognize the sender.

Here ya go, Bob! Apologies you were not on the original email. Please let us know if you have any questions.

Best,  
Katie

---

**From:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Sent:** Monday, April 24, 2023 2:12 PM  
**To:**  
**Cc:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Subject:** UNCG/rpk - Review Requested for 5/2 Town Hall Presentation

Hi

Attached is the draft presentation that we'd like to share during next Tuesday's town hall. If you can review and provide feedback by this Friday, 4/28, that would be appreciated.

Of note:

- Slide 13 - would you like us to indicate a date when the academic data dashboards will formally be part of the decision-making process?
- Slide 18 - this is a holder for the academic structure present in the dashboards. It is being informed by conversations with Deans this week related to financial structures.

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

UNCG



# UNC Greensboro Academic Data Dashboards

May 2, 2023

rpk GROUP  
from mission to market

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# About rpk GROUP

12  
years

Mix of public,  
private, two-year,  
and four-year  
institutions

36 States  
3 Continents

200+

Colleges, Universities,  
Associations, and Foundations

Specializing in sustainable  
financial models, strategic  
platform creation, and the  
financial model behind  
mission and equitable  
student success

# The rpk Way

## Mission, Market, and Margin®

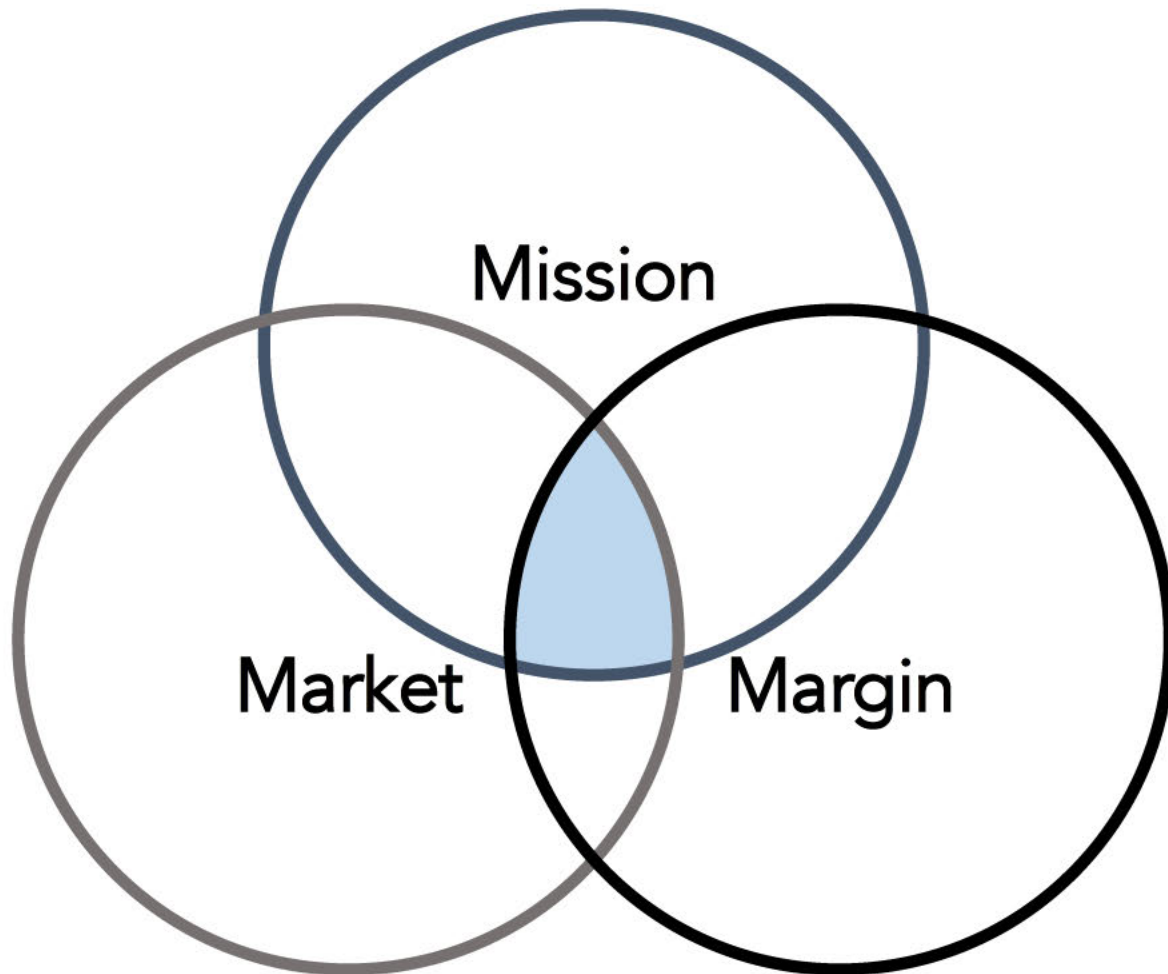
*We help institutions, systems and states live at the intersection of student needs and a sustainable financial model, in order to fulfill strategy and mission.*

**rpk GROUP**  
from mission to market

- 1. Knowledge is our currency and we share it openly.*
- 2. We possess deep domain experience in the academic sphere.*
- 3. Our efforts are grounded in achieving a sustainable financial model.*
- 4. We use data to tell stories that drive progress.*
- 5. We have a bias toward action and help our partners embrace change.*

*Our job isn't done until the work is sustainable.*

# Managing the New Landscape



**Mission** – Where do we excel?

**Market** – What do those we serve need?

**Margin** – How do we create a sustainable model?

# What is rpk's role in supporting UNCG?

Develop Academic  
Data Dashboards

Assess Opportunities  
for Institutional  
Efficiencies & Service  
Improvement

Advise as Requested

# UNCG/rpk Data Team

- Assistant Controller for Financial Reporting
- Professor, Counseling and Educational Development
- Lead Business Intelligence, Projects, and Reporting
- Professor, Music Education
- , HRIS Manager
- , Professor, Human Development and Family Studies
- , Dean of Undergraduate Studies
- , Associate Director of Institutional Research and Enterprise Data Management
- , Professor, English
- , Assistant Dean for Advising and Student Success
- , Finance and Administration Reporting & Visualization



# Academic Data Dashboards Will Inform UNCG's Larger Efforts





# Parameters for Academic Data Dashboards

- All academic data is from UNCG's IR Department
- Initial data inputs will be derived from:
  - Course, faculty, and academic program data from academic years 2020, 2021, and 2022
  - Data extracted at end of terms:
    - Fall, Winter, Spring, and Summer
- Department financial data and labor market data will not be active elements in first iterations of dashboards, but the data and analyses will be provided to the Provost's Task Force

# Design and Content of Academic Data Dashboards

**Summary Lens**  
(School/College/Year)

- Academic Program Enrollment
- Student Credit Hours
- Median Class Size
- Student Credit Hours per Faculty FTE
- Faculty FTE by Type

**Academic Department Lens**  
(School/College/Department/Year)

- Student Credit Hours
- Median Class Size
- Student Credit Hours per Faculty FTE
- Faculty FTE by Type

**Academic Program Lens**  
(School/College, Year, Department, Program Name, Student Level, Student Type, Race/Ethnicity)

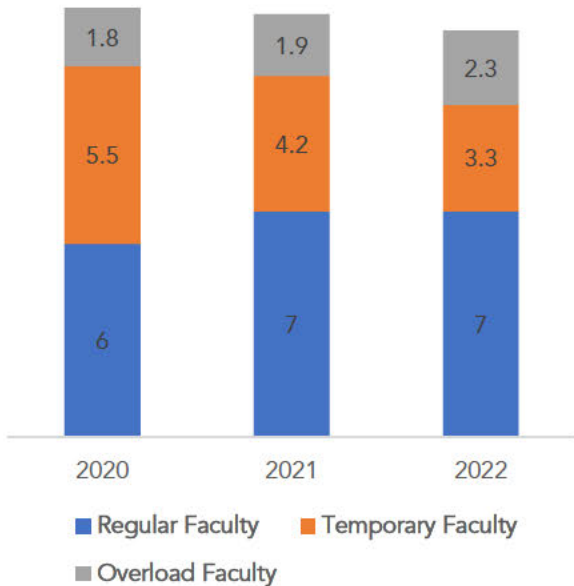
- Matrix
- Admits/Enrolls
- Average Duplicated Headcount
- Retention (Program and Institution)
- Graduation
- Time to Degree

FTE: Full-time equivalency

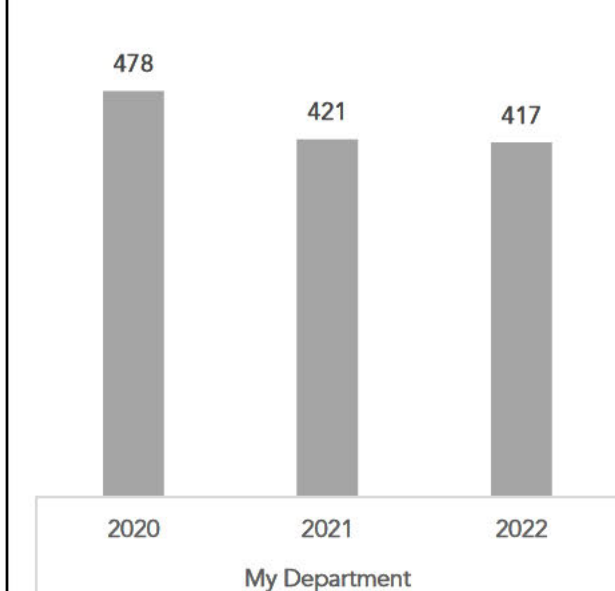
# Potential Use of Academic Data Dashboards (1/3)

I know my department has relied on fewer temporary faculty since 2020. How has that decision impacted teaching productivity?

Faculty FTE by Type



SCH per Faculty FTE



**Summary Lens**  
(School/College)

- Academic Program Enrollment
- Student Credit Hours
- Median Class Size
- Student Credit Hours per Faculty FTE
- Faculty FTE by Type

**Academic Department Lens**  
(School/College/Department/Year)

- Student Credit Hours
- Median Class Size
- Student Credit Hours per Faculty FTE
- Faculty FTE by Type

**Academic Program Lens**

(School/College, Year, Department, Program Name, Student Level, Student Type, Race/Ethnicity)

- Matrix
- Admits/Enrolls
- Average Duplicated Headcount
- Retention (Program and Institution)
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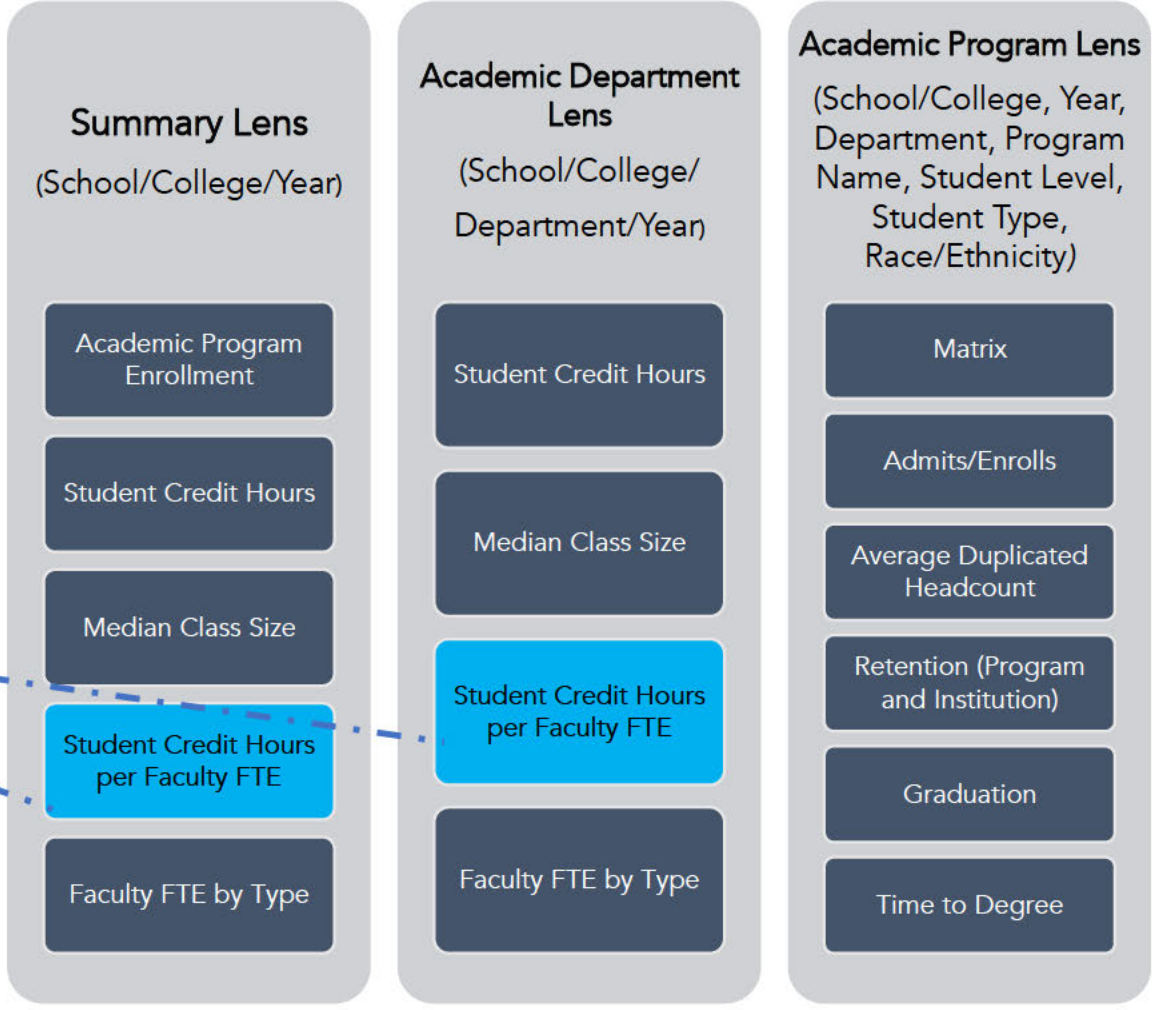
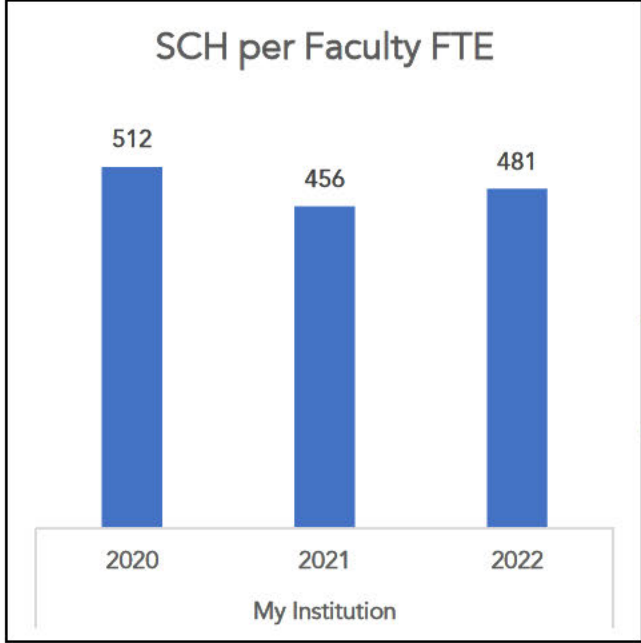
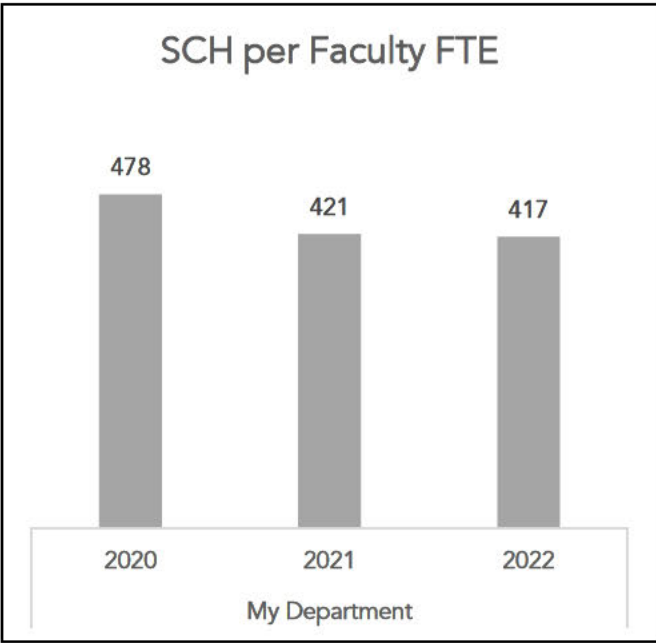
FTE: Full-time equivalency

Graphs are intended for illustrative purposes only. They are not representative of UNCG data.

# Potential Use of Academic Data Dashboards (2/3)

I know my department has relied on fewer temporary faculty since 2020. How has that decision impacted teaching productivity?

Does my department's decision align with UNCG's trends for teaching productivity?



FTE: Full-time equivalency  
Graphs are intended for illustrative purposes only. They are not representative of UNCG data.

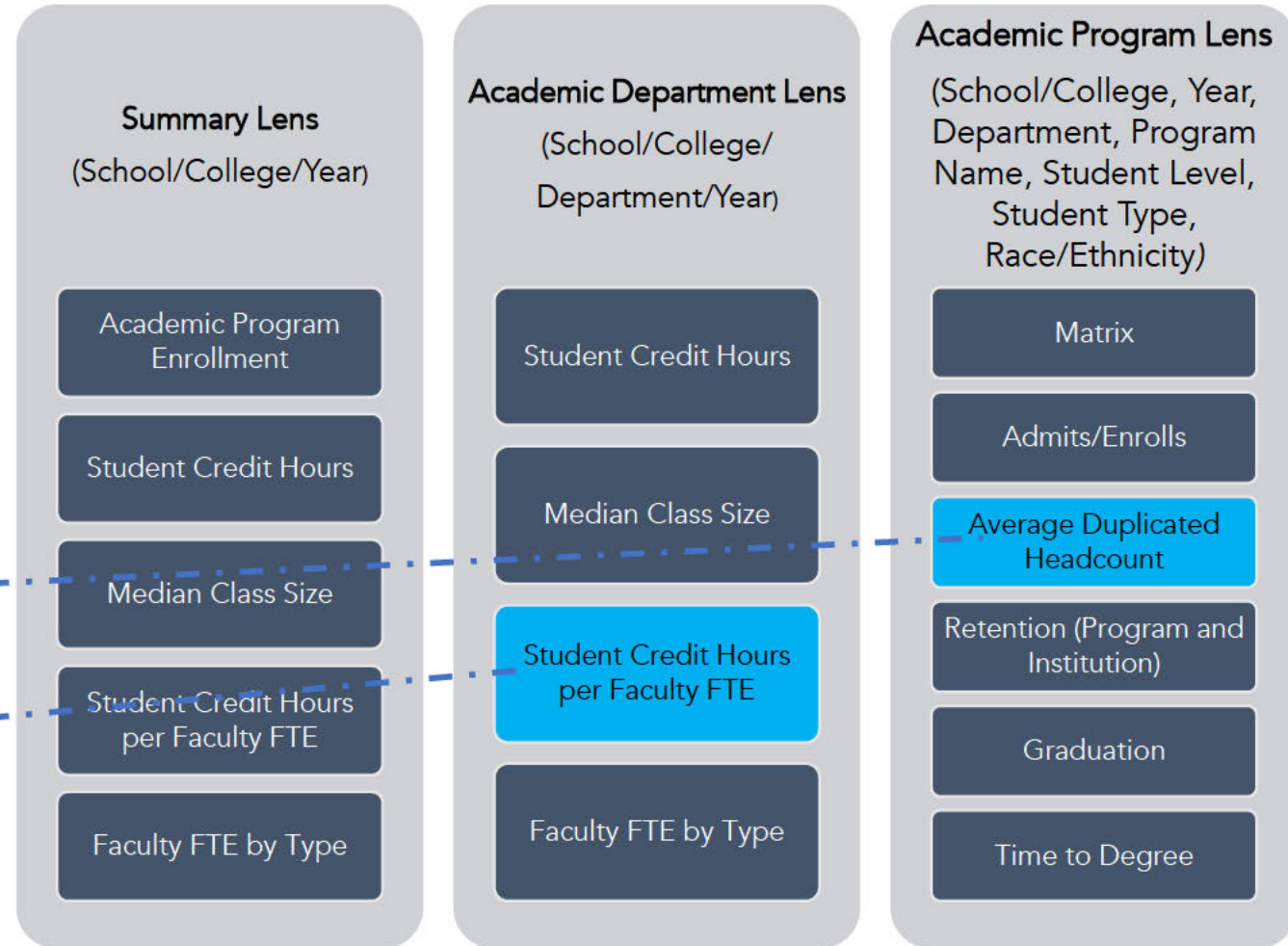
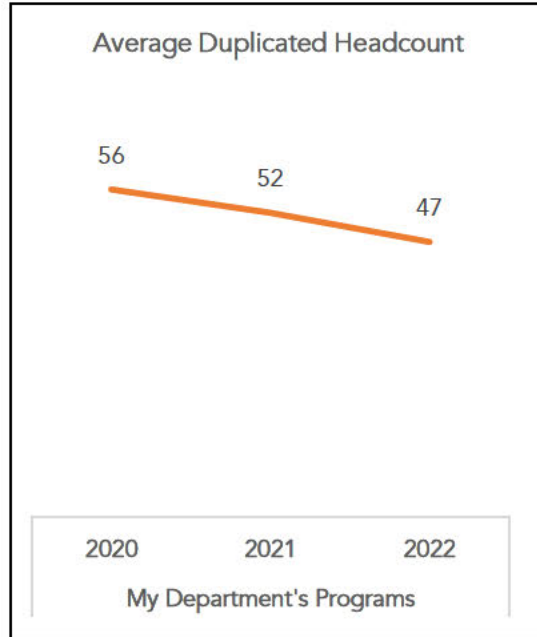
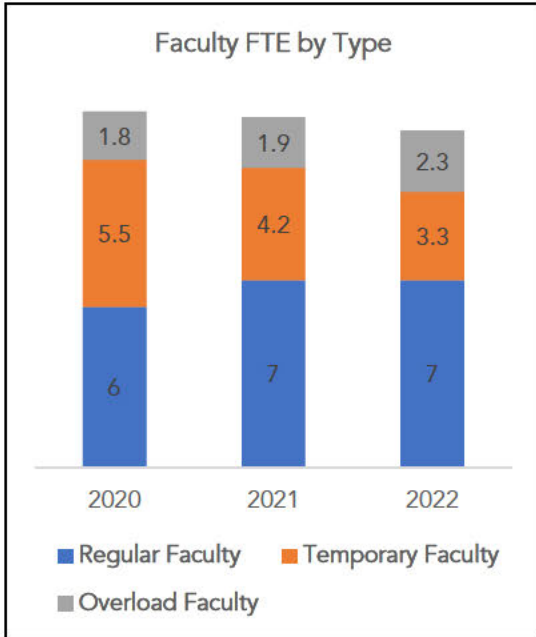


# Potential Use of Academic Data Dashboards (3/3)

I know my department has relied on fewer temporary faculty since 2020. How has that decision impacted teaching productivity?

Does my department's decision align with UNCG's trends for teaching productivity?

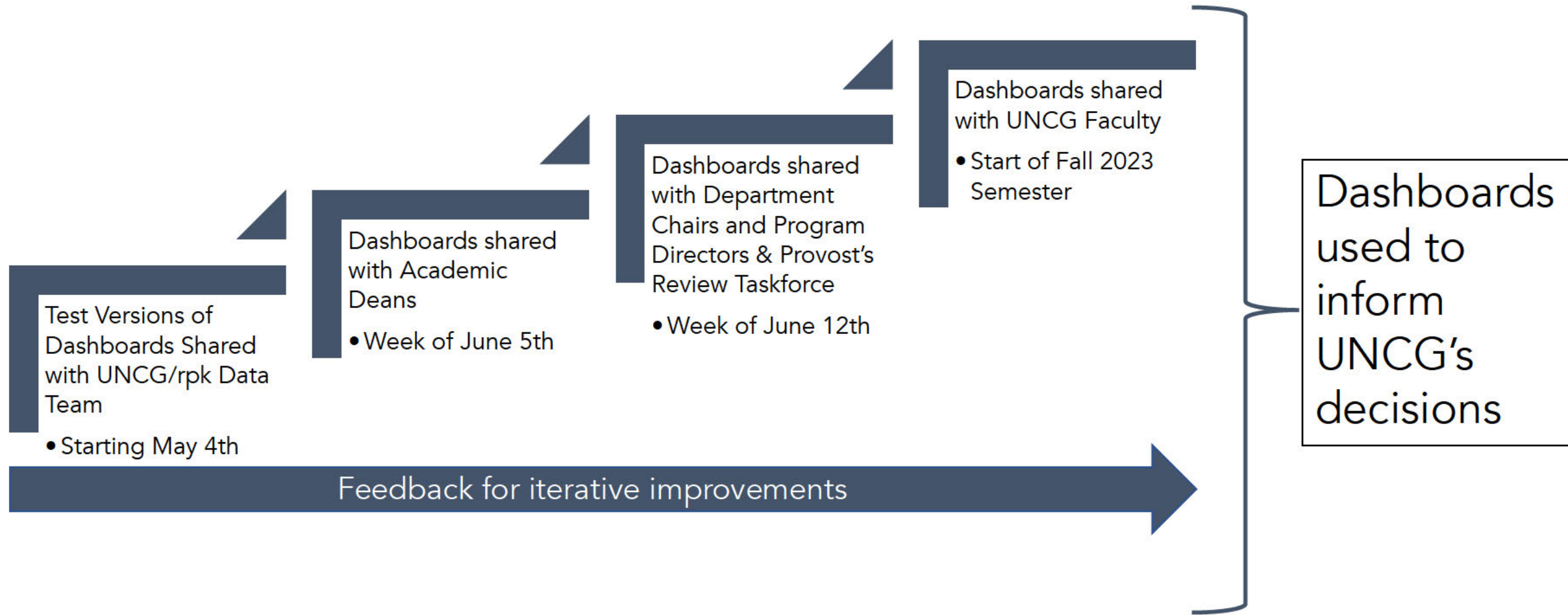
Has the decision to utilize fewer temporary faculty aligned with the number of students enrolled in programs supported by my department?



FTE: Full-time equivalency

Graphs are intended for illustrative purposes only. They are not representative of UNCG data.

# Engagement, Feedback, and Utilization Trajectory





# Questions?



You can always ask questions or submit comments at: <https://forms.office.com/r/RdMqrdwpnj>

# Thank you

Katie Hagan  
khagan@rpkgroup.com

Mike Daly  
mdaly@rpkgroup.com

# Appendix: Definitions and Mapping

# Draft Definitions for Academic Data Dashboards Definitions (alphabetical)

- Academic Program Enrollment: the number of students who have declared a major in the program; unique count across academic year.
- Academic Program Enrollment Trend: the increase or decrease of the number of students who have declared a major in the program across the years of analysis.
- Average Duplicated Headcount: the number of students declared as major in an academic program; students with multiple majors are counted multiple times.
- Admits/Enrolled: the number of applicants that have been admitted / number of applicants that have enrolled.
- Faculty FTE by Type: *under review. Typically, a calculated value of 1 FTE = x-Credit Hours.*
- Graduation: the number of degrees or certificates awarded; collected across academic year.
- Median Class Size: the median class size for classes categorized as 'organized class courses' by UNC System (Lab, Lecture, Lecture & Lab, Recitations, Seminar, and Studio). For combined classes from two or more different departments the department with the larger enrollment is assigned the median calculation. Combined classes from two or more different departments with equal enrollments are excluded)\*
- Retention (Program): based on retention cohort, number of students that started in the program one year prior to analysis, the number of declared majors that started in the program one year prior to the year of analysis (Fall to Fall).
- Retention (Institution): the number of students from retention cohort that remain (or complete) at the institution after one year (Fall to Fall).
- Student Credit Hours: the product of students enrolled multiplied by course credits. For all student credit hours, accumulated credits are assigned to the course subject's home department. For all combined classes, student credit hours are assigned to each unique course subject present in combined offering.
- Student Credit Hours per Faculty FTE: the quotient of all student credit hours produced by an academic unit divided by the total faculty FTE in that same academic unit. All student credit hours taught by faculty are assigned to their home department.
- Time to Degree: the average number of years to degree for full-time students who earn a degree in the program within the academic year, regardless of the original major.

Final approval of definitions and methodologies will follow UNCG's established Data Governance process.

\*11 instances of combined classes from two or more different departments having equal enrollments from 2020-2022.



# Mapping of Academic Structure in Academic Data Dashboards

- INSERT

**From:**  
**To:** [Mike Daly](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Project Update  
**Date:** Friday, April 28, 2023 8:41:56 AM  
**Attachments:** [Outlook-cdrmicou.png](#)

---

Thanks Mike,  
I've pinged \_\_\_\_\_ to advance the chair/head training draft that  
you provided them.

Yes, please send me anything you can find. I'm working my networks too to find rubrics.

---

**From:** Mike Daly <mdaly@rpkgroup.com>  
**Sent:** Thursday, April 27, 2023 9:23 PM  
**To:** \_\_\_\_\_ Bob Shea  
**Cc:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** UNCG/rpk Weekly Project Update

**Caution:** This email originated from outside of UNCG. Do not click links or open attachments unless you recognize the sender.

Hi \_\_\_\_\_ and Bob,

Attached is the weekly project update. I'll point out that the 'off-track' status for the academic program list is reflective of our work to ensure that we have accurately identified programs that have been deactivated during the years of our initial data analysis, as well as reflecting program name changes that may have occurred. We received excellent feedback from the Data Team and others at UNCG regarding changes to academic programs. Our review has not impacted the collection of academic program data.

I'm continuing to research publicly available rubrics for program review purposes.

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209



**From:** [Rick Staisloff](#)  
**To:** [Bob Shea](#)  
**Cc:** [Laura Reames](#);  
**Subject:** UNCG - Progress Invoice 23-0036 - March - RPK GROUP  
**Date:** Friday, April 28, 2023 1:43:09 PM  
**Attachments:** [image001.png](#)  
[UNCG - rpk GROUP - Progress Invoice 23-0036 - March 2023.pdf](#)

---

**Caution:** This email originated from outside of UNCG. Do not click links or open attachments unless you recognize the sender.

Bob,

Attached please find our progress invoice for March.

Let me know if you have any questions, or require additional information to process this.

Regards,

Rick

**rpK** GROUP  
from mission to market

Richard Staisloff | Senior Partner | [rpK GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

**From:** [Rick Staisloff](#)  
**To:** [Bob Shea](#)  
**Subject:** RE: UNCG - Progress Invoice 23-0036 - March - RPK GROUP  
**Date:** Friday, April 28, 2023 2:12:48 PM  
**Attachments:** [image001.png](#)  
[image002.png](#)

---

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Same to you my friend

**rpk** GROUP  
from mission to market

Richard Staisloff | Senior Partner | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

---

**From:** Bob Shea  
**Sent:** Friday, April 28, 2023 2:09 PM  
**To:** Rick Staisloff <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>  
**Cc:** Laura Reames <[lreames@rpkgroup.com](mailto:lreames@rpkgroup.com)>;  
**Subject:** RE: UNCG - Progress Invoice 23-0036 - March - RPK GROUP

Thanks Rick. Enjoy the weekend.

**Bob Shea**  
**Vice Chancellor for Finance and Administration**  
**University of North Carolina Greensboro**  
**Mossman Building 254**



---

**From:** Rick Staisloff <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>  
**Sent:** Friday, April 28, 2023 1:42 PM  
**To:** Bob Shea

# rpk GROUP

626C Admiral Drive, Suite 511  
Annapolis, MD 21401, United States  
Tel: 410-591-9018  
rstaisloff@rpkgroup.com  
www.rpkgroup.com



## INVOICE

Robert Shea  
University of North Carolina-Greensboro  
1400 Spring Garden Ct  
Greensboro, NC 27412

TAX ID:  
INVOICE DATE: 4/11/2023  
INVOICE NO: 23-0036  
BILLING THROUGH: 3/31/2023

PROFESSIONAL SERVICES	HOURS	RATE	AMOUNT
Associate	121.75	\$350.000	\$42,612.50
Principal	17.75	\$450.000	\$7,987.50
Senior Partner	1.00	\$450.000	\$450.00
Specialist II	8.25	\$1.000	\$8.25
<b>TOTAL SERVICES</b>	<b>148.75</b>		<b>\$51,058.25</b>
		<b>SUBTOTAL</b>	<b>\$51,058.25</b>
		<b>AMOUNT DUE THIS INVOICE</b>	<b>\$51,058.25</b>

This invoice is due on 5/11/2023

Richard Staisloff, Senior Partner  
rstaisloff@rpkgroup.com

Laura Reames, Billing Contact  
lreames@rpkgroup.com

Remit payment to:  
rpk GROUP  
626C Admiral Drive, Suite 511  
Annapolis, MD 21401

**Cc:** Laura Reames <[lreames@rpkgroup.com](mailto:lreames@rpkgroup.com)>;

**Subject:** UNCG - Progress Invoice 23-0036 - March - RPK GROUP

**Caution:** This email originated from outside of UNCG. Do not click links or open attachments unless you recognize the sender.

Bob,

Attached please find our progress invoice for March.

Let me know if you have any questions, or require additional information to process this.

Regards,

Rick

**rp**k GROUP  
from mission to market

Richard Staisloff | Senior Partner | [rpkg GROUP](http://rpkgroup.com)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rtaisloff@rpkgroup.com](mailto:rtaisloff@rpkgroup.com) | Cell: 410-591-9018

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#); [Raven Moody](#);  
**Subject:** Re: Discuss rpk/UNCG Financial Analysis  
**Date:** Wednesday, May 3, 2023 9:51:19 AM  
**Attachments:** [image001.png](#)

---

Thanks, Bob. We can talk today about whether and how the budget process may be different from this analysis given the importance of the academic units developing some understanding of the extent to which they cover their costs, receive subsidization from other units, etc. Looking forward to the conversation.

Best,  
Katie

---

**From:** Bob Shea  
**Sent:** Wednesday, May 3, 2023 9:41 AM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>; Raven Moody <[rmoody@rpkgroup.com](mailto:rmoody@rpkgroup.com)>;  
**Subject:** RE: Discuss rpk/UNCG Financial Analysis

Katie and Raven,

Here are the department budgets for 22-23 to inform this afternoon's discussion. We do not allocate revenue, we are a true incremental budgeting shop where the base budgets were developed years ago and we just increment/decrement from those based on available resources.

We are implemented Anaplan to help with our budget planning.

**Bob Shea**  
**Vice Chancellor for Finance and Administration**  
**University of North Carolina Greensboro**  
**Mossman Building 254**



---

**From:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Sent:** Monday, May 1, 2023 4:00 PM

**To:** Bob Shea ; Raven Moody <rmoody@rpkgroup.com>;

**Subject:** Re: Discuss rpk/UNCG Financial Analysis

**Caution:** This email originated from outside of UNCG. Do not click links or open attachments unless you recognize the sender.

Hi Bob and

Raven and I are looking forward to checking in on Wednesday. Here is a high level idea of what we'd like to cover:

1. Walk you through the approach to our analysis on the expense side, including the discussion of some exclusions
2. Discuss potential approaches to model revenue allocation, specifically how the state revenue is/is not allocated to offset departmental costs. We'll need to decide if we want any of it in, and if so, how much, and what formula should be used for allocation (old funding model or new)

Thanks again for making the time,  
Katie

---

**From:** Katie Hagan

**Sent:** Monday, April 24, 2023 9:43 AM

**To:** Bob Shea ; Raven Moody <[rmoody@rpkgroup.com](mailto:rmoody@rpkgroup.com)>;

**Subject:** Discuss rpk/UNCG Financial Analysis

**When:** Wednesday, May 3, 2023 4:00 PM-4:50 PM.

**Where:** Microsoft Teams Meeting

---

## Microsoft Teams meeting

Join on your computer, mobile app or room device

[Click here to join the meeting](#)

Meeting ID:

Passcode:

[Download](#) [Join on the web](#)

[Learn More](#) | [Meeting options](#)





**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#); [Raven Moody](#);  
**Subject:** Re: Discuss rpk/UNCG Financial Analysis  
**Date:** Monday, May 1, 2023 4:00:32 PM

---

**Caution:** This email originated from outside of UNCG. Do not click links or open attachments unless you recognize the sender.

Hi Bob and

Raven and I are looking forward to checking in on Wednesday. Here is a high level idea of what we'd like to cover:

1. Walk you through the approach to our analysis on the expense side, including the discussion of some exclusions
2. Discuss potential approaches to model revenue allocation, specifically how the state revenue is/is not allocated to offset departmental costs. We'll need to decide if we want any of it in, and if so, how much, and what formula should be used for allocation (old funding model or new)

Thanks again for making the time,  
Katie

---

**From:** Katie Hagan  
**Sent:** Monday, April 24, 2023 9:43 AM  
**To:** Bob Shea                                 Raven Moody <rmoody@rpkgroup.com>;  
**Subject:** Discuss rpk/UNCG Financial Analysis  
**When:** Wednesday, May 3, 2023 4:00 PM-4:50 PM.  
**Where:** Microsoft Teams Meeting

---

## Microsoft Teams meeting

Join on your computer, mobile app or room device  
[Click here to join the meeting](#)

Meeting ID:

\_\_\_\_\_d     [Join on the web](#)

[Learn More](#) | [Meeting options](#)

---

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#)  
**Subject:** On campus next week - meet about finance data?  
**Date:** Wednesday, May 3, 2023 8:38:10 PM

---

Hi Bob,

Thanks so much for the time today. I'll be on campus next Friday (5/12) so can meet in person to review the analysis we talked about today. I am free before 10am, 12-1:30pm, and after 4:30pm. No worries if that won't work on your end, just wanted to offer in case you have some time.

Thanks,  
Katie

**rpk** GROUP  
from mission to market

Katie Hagan | Principal | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#)  
**Subject:** Re: On campus next week - meet about finance data?  
**Date:** Thursday, May 4, 2023 10:58:11 AM  
**Attachments:** [image001.png](#)

---

Thanks for the quick response. We can just go back and forth via email and set up a call if needed.

---

**From:** Bob Shea  
**Sent:** Thursday, May 4, 2023 9:01 AM  
**To:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** RE: On campus next week - meet about finance data?

Thanks Katie.

**Bob Shea**  
**Vice Chancellor for Finance and Administration**  
**University of North Carolina Greensboro**  
**Mossman Building 254**



---

**From:** Katie Hagan <khagan@rpkgroup.com>  
**Sent:** Wednesday, May 3, 2023 8:38 PM  
**To:** Bob Shea  
**Subject:** On campus next week - meet about finance data?

Hi Bob,

Thanks so much for the time today. I'll be on campus next Friday (5/12) so can meet in person to review the analysis we talked about today. I am free before 10am, 12-1:30pm, and after 4:30pm. No worries if that won't work on your end, just wanted to offer in case you have some time.

Thanks,  
Katie

# rpk GROUP

from mission to market

Katie Hagan | Principal | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com) | 757-589-0490

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Project Update  
**Date:** Friday, May 5, 2023 11:54:57 AM  
**Attachments:** [Outlook-pvcwadvx.png](#)  
[UNCG Weekly Project Update 2023.05.04.pdf](#)  
[UNCG rpk Project Update for Website 2023.05.04.docx](#)

---

Hi and Bob,

Attached is the weekly project tracker for your review. Certainly welcome any questions before you touch base next Wednesday with Katie and/or before I met with the Provost's Taskforce.

, also attached for your review and posting is the bi-weekly project update for the UNCG community.

Have a great weekend.

Thanks again,  
Mike Daly

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**University North Carolina Greensboro  
Academic Data Dashboards  
Project Update  
May 4, 2023**

Since the last project update on April 21, 2023, rpk GROUP (rpk) has continued to engage multiple stakeholder groups with project updates.

The Data Team continued to meet regularly and has reviewed the list of UNCG's academic programs that will be in the academic data dashboards. This list is reflective of the annual list of programs/majors UNCG provides to SASCOC. The Data Team confirmed the faculty types and representative thereof that will be available in the dashboards.

rpk provided a project update to the UNCG community on May 2<sup>nd</sup>. This virtual town hall was recorded and [will be made available on the project website.](#)

rpk meets with the Provost's Portfolio Review Taskforce on May 10<sup>th</sup> to facilitate additional understanding of how the academic data dashboards may inform the work being conducted by that group.

The UNCG community is encouraged to submit questions or comments regarding the project can be directed directly to Mike Daly at [mdaly@group.com](mailto:mdaly@group.com) or through [the project's feedback form.](#)

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UNCG



# UNCG & rpk GROUP

## Status Report: May 5, 2023

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# Data Team Update 1/3

- **General Decisions**

- Years of analysis will be AY2020, AY2021, and AY2022.
- The data extraction date for the course, faculty, and academic program data will be the end of the term. This allows for alignment with how the UNC system uses data.

## Course Data Decisions

- Class types included for median class size will be those categorized as 'organized class course' by UNC System:
  - Lab, Lecture, Lecture & Lab, Recitations, Seminar, and Studio
- For combined classes, the following methodology will be applied to assign median class size when two or more departments are combined:
  - Unequal enrollment – class with highest enrollment is assigned median class size.
  - Equal enrollment – excluded in recognition of UNCG moving to install practice of assigning primary class (11 instances).
- Based on lack of consistent data regarding program credits, the metric of excess credits to degree will not be present in the dashboards.
- Course data in dashboard will be inclusive of organized schools/college and departments
  - Courses mapped to 'Associate Dean Programs,' Deans Office – VP,' 'Undergraduate Studies,' 'Comp Trans and Post-Sec Edu,' Deans Office – HH,' 'UNC Exchange,' and 'OT,' are not included.\*

\*the activity of faculty teaching these courses will follow faculty's home academic department and be included in the dashboard.

# Data Team Update 2/3

## • Faculty Data

- The academic data dashboard will not utilize UNCG's Instructional Analysis Report (IAR).
- Faculty Categories in academic data dashboard for each academic year:
  - Permanent Faculty
    - 1.0 FTE or amount representative of reduced contractual obligations.
    - Permanent faculty at UNCG for one semester are .5 FTE.
  - Temporary Faculty
    - Calculated as 1 FTE = 24 credits
    - 9 and 10-month faculty are calculated as temporary faculty for summer instruction

Sample Department AY 2020			
	Fall/Spring	Summer	Total FTE
Permanent Faculty	6.5 FTE	72 credits $72/24 = 3.0$ FTE	9.5 Permanent Faculty FTE
Temporary Faculty	740 credits $740/24 = 31.0$ FTE	30 credits $30/24 = 1.25$ FTE	32.25 Temporary Faculty FTE

} 41.75  
Total  
Faculty  
FTE

# Data Team Update 3/3

## Academic Program List

- The academic programs in the academic dashboards are representative of UNCG's programs/majors as recorded in UNCG's annual Institutional Summary form prepared for SACSOC Reviews.
  - Current, active programs/majors for all degree types:
    - Programs/majors deactivated during AY20-22 are not included.
    - Programs/majors with UNCG approved pending status changes for Fall 2023 are shown in their current state.
    - Programs starting in Fall 2023 are not included.
    - Concentrations/minors are not included.
      - UNCG IR's program dashboard provides more granularity.
  - Applied Methodologies
    - Program/majors that combined multiple UNCG schools/departments and/or programs/majors lacking an organized academic unit do not have an assigned school or department in the dashboard.
      - These programs will still be visible in the academic data dashboard.



# Project Overview: April 27– May 4

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>• Mike provided project update to Faculty Senate Executive Committee (5/1).</li> <li>• Katie and Raven continued meeting with Bob and to review approach to direct net revenue analysis (5/3).</li> <li>• Provided project update and dashboard introduction to UNCG community during town hall (5/2).</li> <li>• Facilitated UNCG/rpk Data Team meeting and shared initial view of course data in dashboard (5/4)</li> <li>• Solidified categories of faculty types with UNCG IR / HR (5/4).</li> </ul>	<ul style="list-style-type: none"> <li>• Mike meeting with Provost's Portfolio Review Taskforce (5/10).</li> <li>• Katie attending Chancellor's Task Force (5/12).</li> <li>• Populating academic data dashboard with faculty and academic program data.</li> <li>• UNCG/rpk Data Team meeting (5/18).</li> <li>• Finalizing list of institutions that will inform the Labor and Market Competition Analysis.</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>• UNCG IR/ HR shared updated faculty data.</li> </ul>	<ul style="list-style-type: none"> <li>• Reviewing shared draft outline for workshops with chairs</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	On Track	On Track	On Track														
Dashboard Development																On Track	On Track	On Track	On Track	On Track	On Track										
Dashboards Shared with Deans																						On Track	On Track	On Track							
Dashboards Shared with Chairs																							On Track	On Track	On Track						
Dashboards Shared with Taskforce																								On Track	On Track	On Track					
Faculty Workshops										Complete	Complete	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track		

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May				June				July					
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	Off Track	Off Track	Off Track	Off Track	Off Track	Off Track	Off Track	Off Track														
Final Report & Recommendations																				Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started

Note: rpk is providing support for the Chancellor's Task Force on Financial Responsibility in place of what was originally scoped for the administrative services review. Katie is continuing to attend those meetings and engaging when asked (e.g., distributing and analyzing the stakeholder feedback survey). Stakeholder interviews and additional analysis and report drafting will be on hold until the Task Force work advances and rpk has a better idea of how to best add value.

Task Force will share final recommendations with the Chancellor on May 22, and from there the remaining work of rpk will be determined.

Key	Complete	On Track	At Risk	Off Track	Not Started
	Complete	On Track	At Risk	Off Track	Not Started

# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Status Meeting (monthly)	[REDACTED] Rick Staisloff	5/15, 12:30pm	-
Provost's Portfolio Review Taskforce	Mike and Taskforce	5/10; 10am	Review recording of 5/2 Town Hall presentation
Project Leaders Meeting (bi-weekly)	[REDACTED] Bob, Katie, and Mike	5/10; 9am	Review project tracker

# Revised Timeline – Academic Data/Dashboards

Data	All Data Collected	Definitions and Methodology Confirmed	Data Validated	Beta Dashboard Launch and Feedback Period	Beta Dashboard Refined Based on Feedback
Academic Program List	3/24	4/18	4/27	6/5 – 6/30	7/3-7
Academic Structure	4/7	4/21	N/A		
Course Data	3/24	4/13	4/21		
Instructor Data	3/31	5/4	5/5		
Faculty Data	4/14	5/4	5/5		
Academic Program Data	4/14	4/28	5/5		
Finance Data	3/24	4/28	5/5	TBD	TBD

Key	Complete	On Track	At Risk	Off Track	Not Started

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Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**From:**  
**To:** [Mike Daly](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Project Update  
**Date:** Friday, May 5, 2023 1:44:09 PM  
**Attachments:** [Outlook-pvcwadvx.png](#)

---

Thanks Mike.

I spoke with \_\_\_\_\_ and he shared a draft of the chair/head training

drafted an email to chairs but I haven't seen it gone out yet - \_\_\_\_\_.

---

**From:** Mike Daly <mdaly@rpkgroup.com>  
**Sent:** Friday, May 5, 2023 11:51 AM  
**To:** \_\_\_\_\_ Bob Shea  
**Cc:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** UNCG/rpk Weekly Project Update

Hi \_\_\_\_\_ and Bob,

Attached is the weekly project tracker for your review. Certainly welcome any questions before you touch base next Wednesday with Katie and/or before I met with the Provost's Taskforce.

\_\_\_\_\_ also attached for your review and posting is the bi-weekly project update for the UNCG community.

Have a great weekend.

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Rick Staisloff](#)  
**To:** [Bob Shea](#)  
**Subject:** Booking Time to Catch Up  
**Date:** Thursday, May 11, 2023 5:00:33 PM  
**Attachments:** [image001.png](#)

---

Wanted to get some time on the books next week to catch up. Let me know if any of these windows work:

5/15 – 1

5/17 – 3

5/19 – 11:30

Rick

**rpk** GROUP  
from mission to market

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626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018



**From:** [Rick Staisloff](#)  
**To:**  
**Cc:** [Bob Shea](#)  
**Subject:** Re: Booking Time to Catch Up  
**Date:** Friday, May 12, 2023 8:18:24 AM  
**Attachments:** [image001.png](#)

---

That works. Thanks for getting this set up.

Regards,

Rick

On May 12, 2023 8:13 AM,  
Hi Rick,

wrote:

I will send a calendar invite for a call on 5/17 at 3:00 pm.

Let me know if I can assist further.

Best regards,

[1202 Spring Garden Street](#)

[Greensboro, NC 27402](#)



"In order to succeed, we must first believe that we can."

[Nikos Kazantzakis](#)

---

**From:** Bob Shea  
**Sent:** Thursday, May 11, 2023 9:50 PM  
**To:** [rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)  
<[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>  
**Subject:** Re: Booking Time to Catch Up

3 works

Get [Outlook for iOS](#)

---

**From:**

**Sent:** Thursday, May 11, 2023 7:51:03 PM

**To:** Bob Shea ; rstaisloff@rpkgroup.com <rstaisloff@rpkgroup.com>

**Subject:** Re: Booking Time to Catch Up

Hi Rick,

Hope you are doing well. 1:00-1:30 will work on 5/15, if you need more than 30 minutes, we may be able to work out a call on 5/17 at 3:00.

Please let me know which works best.

Thanks!

Get [Outlook for Android](#)

---

**From:** Bob Shea

**Sent:** Thursday, May 11, 2023 6:43:33 PM

**To:**

**Subject:** Fwd: Booking Time to Catch Up

Pls coordinate as a priority.

Bob Shea

Begin forwarded message:

**From:** Rick Staisloff <rstaisloff@rpkgroup.com>

**Date:** May 11, 2023 at 5:00:33 PM EDT

**To:** Bob Shea

**Subject: Booking Time to Catch Up**

Wanted to get some time on the books next week to catch up. Let me know if any of these windows work:

5/15 – 1

5/17 – 3

5/19 – 11:30

Rick

# rpk GROUP

from mission to market

Richard Staisloff | Senior Partner | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Project Update  
**Date:** Friday, May 12, 2023 12:15:29 PM  
**Attachments:** [Outlook-nfgrgq2w.png](#)  
[UNCG Weekly Project Update 2023.05.11.pdf](#)  
[MDO Competitor List Draft v2.xlsx](#)

---

Hi and Bob,

Two items are attached for your review and awareness.

1. Weekly project tracker
  - a. Of note:
    - i. Academic program data for graduate students (particularly new metrics for UNCG, retention, and time to degree) have been slowed as UNCG IR has been asked to fulfill unexpected but critical data needs for the institution. I'm confident we'll get these metrics over the next week.
    - ii. Planning workshops for department chairs has not progressed. I'll continue to reach out to and .
2. The list of institutions that we identified as being significantly present from National Clearinghouse Data related to accepted students who chose not to enroll at UNCG and students who transferred out of UNCG.
  - a. Please let me know if you'd like to include the bottom two (both private).
  - b. This list will be utilized for our labor and market competitor analysis.

Thanks again,  
Mike Daly

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from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
mdaly@rpkgroup.com | Cell: 518-796-2209

UNCG



# UNCG & rpk GROUP

## Status Report: May 11, 2023

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from mission to market

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# Project Overview: May 5 – May 11

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>• Mike met with Provost's Academic Portfolio Review Taskforce and shared resources from 5/2 town hall (5/10).</li> <li>• Finalized list of institutions informing Labor and Market Competitor Analysis.</li> <li>• Finalized academic structure informing dashboards and shared with UNCG IR.</li> <li>• Katie reviewed draft findings from Chancellor's Financial Sustainability Taskforce.</li> <li>• Mike met with UNCG IR's PowerBI team to discuss formal hand-off of dashboards (5/11).</li> </ul>	<ul style="list-style-type: none"> <li>• Katie attending Chancellor's Financial Sustainability Taskforce (5/12).</li> <li>• Rick meeting with (5/15).</li> <li>• Mike meeting with Data Stewards to review data decisions to date (5/15).</li> <li>• UNCG/rpk Data Team meeting (5/18).</li> <li>• Draft findings from Labor and Market Competitor Analysis.</li> <li>• Draft direct net revenue analysis.</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>• UNCG IR/ HR shared updated faculty data.</li> <li>• UNCG IR share mapping of course subject codes to revenue allocations per UNC System model.</li> <li>• UNCG IR reviewed approach to programs split across departments and are coordinating a new data flow.</li> </ul>	<ul style="list-style-type: none"> <li>• Scheduling opportunities for academic data dashboards as part of Chairs' workshops and trainings.</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started



# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	On Track	On Track	On Track														
Dashboard Development																On Track	On Track	On Track	On Track	On Track	On Track										
Dashboards Shared with Deans																							On Track	On Track	On Track						
Dashboards Shared with Chairs																								On Track	On Track	On Track					
Dashboards Shared with Taskforce																									On Track	On Track	On Track				
Faculty Workshops										Complete	Complete	On Track	On Track	On Track	On Track	On Track	On Track	At Risk	At Risk	At Risk		On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk														
Final Report & Recommendations																				At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk

Note: rpk is providing support for the Chancellor’s Task Force on Financial Responsibility in place of what was originally scoped for the administrative services review. Katie is continuing to attend those meetings and engaging when asked (e.g., distributing and analyzing the stakeholder feedback survey). Stakeholder interviews and additional analysis and report drafting will be on hold until the Task Force work advances and rpk has a better idea of how to best add value.

Task Force will share final recommendations with the Chancellor on May 22, and from there the remaining work of rpk will be determined.

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Status Meeting (monthly)	[REDACTED] Rick Staisloff	5/15, 12:30pm	-
Data Stewards Meeting	Mike and Data Stewards	5/15, 1:00pm	Sharing data decisions informing dashboards
UNCG/rpk Data Team meeting	Data Team members	5/18, 10:00am	
Project Leaders Meeting	[REDACTED] Bob, Katie and Mike	5/22, 8:30am	Review weekly project trackers

# Revised Timeline – Academic Data/Dashboards

Data	All Data Collected	Definitions and Methodology Confirmed	Data Validated	Beta Dashboard Launch and Feedback Period	Beta Dashboard Refined Based on Feedback
Academic Program List	3/24	4/18	4/27	6/5 – 6/30	7/3-7
Academic Structure	4/7	4/21	N/A		
Course Data	3/24	4/13	4/21		
Instructor Data	3/31	5/4	5/5		
Faculty Data	4/14	5/4	5/5		
Academic Program Data*	4/14	4/28	5/5		
Finance Data	3/24	5/19	5/26	TBD	TBD

\* UNCG IR received unanticipated requests for data in support of system and legislative conversations. Those requests have delayed the final development of two metrics related to graduate programs.

Key	Complete	On Track	At Risk	Off Track	Not Started

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# Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

		Sum of Count of Year 1: School		
		Code/Branch of First Different X		
Two Year or Four Year?	Row Labels	Institution Attended	state	city
Four Year	University of North Carolina at Greensboro	<i>client</i>	NORTH CAROLINA	Greensboro
Four Year	UNIVERSITY OF NORTH CAROLINA - CHARLOTTE	980	NORTH CAROLINA	Charlotte
Four Year	APPALACHIAN STATE UNIVERSITY	571	NORTH CAROLINA	Boone
Four Year	NORTH CAROLINA STATE UNIVERSITY	564	NORTH CAROLINA	Raleigh
Four Year	EAST CAROLINA UNIVERSITY	522	NORTH CAROLINA	Greenville
Four Year	UNIVERSITY OF NORTH CAROLINA-CHAPEL HILL	420	NORTH CAROLINA	Chapel Hill
Four Year	UNIVERSITY OF NORTH CAROLINA-WILMINGTON	261	NORTH CAROLINA	Wilmington
Four Year	WESTERN CAROLINA UNIVERSITY	166	NORTH CAROLINA	Cullowhee
Four Year	NORTH CAROLINA CENTRAL UNIVERSITY	123	NORTH CAROLINA	Durham
Four Year	WINSTON SALEM STATE UNIVERSITY	92	NORTH CAROLINA	Winston-Salem
Four Year	FAYETTEVILLE STATE UNIVERSITY	84	NORTH CAROLINA	Fayetteville
Four Year	ELON UNIVERSITY	66	NORTH CAROLINA	Elon
Four Year	HIGH POINT UNIVERSITY	64	NORTH CAROLINA	High Point



<b>public/private</b>	<b>highest degree offered</b>	<b>12-month full-time equivalent enrollment (2021)</b>
Public	Doctor's degree - research/scholarship and professional practice	17,239
Public	Doctor's degree - research/scholarship and professional practice	27,006
Public	Doctor's degree - research/scholarship and professional practice	19,619
Public	Doctor's degree - research/scholarship and professional practice	31,731
Public	Doctor's degree - research/scholarship and professional practice	25,329
Public	Doctor's degree - research/scholarship and professional practice	28,963
Public	Doctor's degree - research/scholarship and professional practice	16,133
Public	Doctor's degree - research/scholarship and professional practice	10,913
Public	Doctor's degree - research/scholarship and professional practice	7,223
Public	Doctor's degree - professional practice	4,980
Public	Doctor's degree - research/scholarship	5,857
Private not-for-profit	Doctor's degree - professional practice	7,014
Private not-for-profit	Doctor's degree - research/scholarship and professional practice	6,329

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#);  
**Cc:** [Raven Moody](#)  
**Subject:** Net Revenue Analysis Description & Decision Point  
**Date:** Friday, May 12, 2023 12:31:14 PM  
**Attachments:** [UNCG Direct Net Revenue Methodology.pdf](#)

---

Hi Bob,

Thanks very much for the time last week to discuss the net revenue analysis. Attached are a few slides that walk through the analysis methodology. There is a decision point with a recommendation on slide 9, so would appreciate your response on that by the end of next week if possible. Please let me know if you have any questions about that or anything else shared in the slides.

Have a great weekend,  
Katie

**rpk** GROUP  
from mission to market

Katie Hagan | Principal | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490



# UNC Greensboro

Direct Net Revenue Analysis

May 12, 2023

# Goals for Direct Net Revenue Analysis

- Transparency
  - Academic department revenues and expenses
  - High-level data across departments and schools over time
- Build shared understanding of:
  - Past resource usage and distribution
  - Levers under our control (both resource and cost drivers)
- Begin shared pursuit of good stewardship amid shifting financial landscape

# Connection to Academic Portfolio Review

Below is what the Task Force assembled by Provost Storrs to make recommendations about academic programs and departments is being asked to consider as it relates to financial & finance-adjacent (faculty, staff) data – bold items are of particular relevance for this analysis:

*Cost and Revenue of Delivery (estimated based on the factors below; all course, personnel, and finance data are tracked in institutional data systems at the department/school level—efforts to capture faculty effort and related costs and revenues at the program level would have to be done manually)*

- 1. Faculty FTE (total full-time and part-time faculty FTE) and faculty headcount by department/school*
- 2. SHRA and EHRA Non-faculty Staff FTE (total full-time and part-time staff FTE) and staff headcount by department/school*
- 3. Personnel spending for all faculty, staff, and graduate teaching/research assistants at the department/school level*
- 4. Non-personnel spending for the department/school*
- 5. Revenue for the department (tuition, differential tuition, fees, state appropriation)**
- 6. Credit hour production by full-time and part-time faculty at the department/school level*
- 7. Cost per credit hour by department/school**

# Developing the Direct Net Revenue Model

- Determine the ‘pot of money’
  - Which revenues and expenses should be included/excluded in the model?
- Determine what will be ‘direct’
  - Which revenues and expenses are specifically related to an academic department?
- Determine allocation methodologies
  - How will the dollars be distributed to the appropriate academic departments?



# What's Included & What's Not?

- Finance Data Source: ODS Data Warehouse, Cash Basis
- Years: FY2020, FY2021 & FY2022
- INCLUDED:
  - Unrestricted funds only. Restricted, Auxiliary, Loan, Endowment, Agency, and Plant funds are excluded.
  - Unrestricted revenues and expenses directly assigned to academic departments are included. All other unrestricted fund activity is excluded, which includes academic administration and institutional administration.
  - Tuition & fees, scholarships/waivers, and state appropriation although not directly assigned to academic departments are included and are allocated based on appropriate methodology.

# Expense Methodology

- All unrestricted fund expenses with a finance org identified as an academic department are included.
- Exceptions:
  - Fund 112073-DNP Prog Tuition Differential is assigned to org 12801-Dean's Office – NU, which is not an academic department. After discussion with dean, it was determined this should be included as a Nursing academic department expense, not a dean expense.
  - Expenses for the Joint School of Nanosci/Nanoeng includes org 13201-Dean's Office – NN and 13202-Nanoscience. Unlike other schools, faculty are assigned to the dean's office org as their home department in HR data as well as charged there in finance data. 13202-Nanoscience contains mostly operational expenses.

# Revenue Methodology: Net Tuition & Fees

- Direct net tuition & fee revenues (includes scholarships and waivers) not assigned to an academic department org will be distributed based on one of the following attributes:
  - **Level** – Allocated to academic departments based on portion of undergraduate or graduate student credit hours produced.
  - **All** – Allocated to all academic departments based on portion of total student credit hours produced.
- **Exceptions:**
  - Differential tuition revenue funds are not assigned to academic department orgs. These are mapped directly to the appropriate academic department org except for those assigned to the Bryan School. Per discussion with Bryan School dean, they centralize those expenditures for expenses not directly related to the instruction of those programs.

# Revenue Methodology: State Appropriation

- State appropriation will be allocated to academic departments using the current funding model logic (amounts allocated to units proportional to the funding per credit hour/academic discipline per the FY23 UNC System formula).
- See next slide for options for determining how much state revenue should flow through the model.

# Scenarios for State Allocation

Options	Descriptions	Amount of State Funding Allocated in rpk Model
Option 1: Most Conservative	Allocate such that the percentage of unrestricted revenue (T&F + State) equals the percentage of unrestricted expense being consumed via direct departmental expenses compared to UNCG's total expenses. For the years of analysis, the direct dept. expense ranges from 37-38% of UNCG total unrestricted expenses.	2020: \$45.4M 2021: \$42.2M 2022: \$57.4M
Option 2: Middle	Award all T&F revenue to academic departments, and then give them the portion of the state revenue proportional to the total direct departmental expenditures. For the years of analysis, the direct dept. expense ranges from 37-38% of UNCG total unrestricted expenses. This differs from the above in that the state aid is not reduced to reflect the fact that all T&F revenue is being awarded to the departments.	2020: \$68.4M 2021: \$66.5M 2022: \$69.9M
Option 3: Least Conservative	Expenses being consumed directly by departments account for 70% of Academic Affairs general fund expenditures. Use that percentage and apply it to what Academic Affairs received via the state budget allocation in the year of analysis (for all years, the total budget from the state is ~\$200M and AA is awarded ~73% of that).	2020: \$109.3M 2021: \$104.2M 2022: \$102.2M

***rpk recommends UNCG uses Option 1 or 2. Both options result in the total direct expenses and total direct revenues breaking even or generating a surplus annually, but not every department will break even or generate a surplus (there will be clear areas of loss that are being subsidized by areas generating a profit).***



# Thank you

Katie Hagan, Principal  
Raven Moody, Sr. Analyst



**From:**  
**To:** [Katie Hagan](#); [Bob Shea](#);  
**Cc:** [Raven Moody](#)  
**Subject:** Re: Net Revenue Analysis Description & Decision Point  
**Date:** Friday, May 12, 2023 1:15:05 PM

---

I like option 1

---

**From:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Sent:** Friday, May 12, 2023 12:30 PM  
**To:** Bob Shea

**Cc:** Raven Moody <[rmoody@rpkgroup.com](mailto:rmoody@rpkgroup.com)>  
**Subject:** Net Revenue Analysis Description & Decision Point

Hi Bob,

Thanks very much for the time last week to discuss the net revenue analysis. Attached are a few slides that walk through the analysis methodology. There is a decision point with a recommendation on slide 9, so would appreciate your response on that by the end of next week if possible. Please let me know if you have any questions about that or anything else shared in the slides.

Have a great weekend,  
Katie

**rp**k GROUP  
from mission to market

Katie Hagan | Principal | [rp](#)k GROUP  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com) | 757-589-0490

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#); [Mike Daly](#)  
**Subject:** Re: UNCG Data Issue to Discuss/Resolve  
**Date:** Tuesday, May 16, 2023 7:50:44 PM  
**Attachments:** [image002.png](#)

---

Hi Bob and ,

Thanks for the flag - happy to discuss. Just to clarify, was there a concern about the dashboards and replicability, or the financial analysis? We've been in touch with and throughout on the dashboard, so this is a surprise, but we can definitely talk it through and see what options we have to resolve. On the financial analysis, that information will not be in the dashboards so replication of that will be different, but not something we feel will be challenging to replicate. We've documented all workflow across the analyses so are in a good position to execute that knowledge transfer. Mike and met about that specifically last week.

Given the time sensitivity of getting to a resolution on this so that we can keep the work moving forward, would you like to meet this week? We can be available in the following windows:

5/17: 12-12:45pm, 3:30-5pm

5/18: 9-10am, 11am-12:30pm, 1-2pm, 3:30-5pm

5/19: 3:30-4:30pm

Best,  
Katie

---

**From:** Bob Shea  
**Sent:** Tuesday, May 16, 2023 5:28 PM  
**To:** [Katie Hagan <khagan@rpkgroup.com>](#); [Mike Daly <mdaly@rpkgroup.com>](#)  
**Subject:** UNCG Data Issue to Discuss/Resolve

Katie and Mike,

We met with [UNCG data leaders] for a regularly scheduled meeting today and an issue came up that we'd like to discuss and resolve at our next check in meeting. and I think it is appropriate for to attend and discuss the technical details. We also wanted you to have the opportunity to discuss with Raven

prior to the meeting and have her attend as well.

Paraphrasing                    here. The issue is the source [Datamart or Banner] and the aggregation of the data into the dashboard.                    both opined that this approach would leave us in the position of not easily being self sufficient with this data/dashboard post rpk engagement. There seems to be a difference of opinion we need to iron out.

, I'm hoping I captured the substance of the issue here in this email.

We're looking forward to discussing and resolving. Thanks in advance.

**Bob Shea**  
**Vice Chancellor for Finance and Administration**  
**University of North Carolina Greensboro**  
**Mossman Building 254**



**From:**  
**To:** [Katie Hagan](#); [Bob Shea](#); [Mike Daly](#);  
**Subject:** Re: UNCG Data Issue to Discuss/Resolve  
**Date:** Wednesday, May 17, 2023 7:53:03 AM  
**Attachments:** [image002.png](#)

---

Good morning,  
The concern is with the replicability of the dashboards.

I'll see if \_\_\_\_\_ can coordinate a meeting this week.

---

**From:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Sent:** Tuesday, May 16, 2023 7:50 PM  
**To:** Bob Shea  
<[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Subject:** Re: UNCG Data Issue to Discuss/Resolve

Mike Daly

Hi Bob and \_\_\_\_\_,

Thanks for the flag - happy to discuss. Just to clarify, was there a concern about the dashboards and replicability, or the financial analysis? We've been in touch with \_\_\_\_\_ throughout on the dashboard, so this is a surprise, but we can definitely talk it through and see what options we have to resolve. On the financial analysis, that information will not be in the dashboards so replication of that will be different, but not something we feel will be challenging to replicate. We've documented all workflow across the analyses so are in a good position to execute that knowledge transfer. Mike and \_\_\_\_\_ met about that specifically last week.

Given the time sensitivity of getting to a resolution on this so that we can keep the work moving forward, would you like to meet this week? We can be available in the following windows:

5/17: 12-12:45pm, 3:30-5pm  
5/18: 9-10am, 11am-12:30pm, 1-2pm, 3:30-5pm  
5/19: 3:30-4:30pm

Best,  
Katie

---

**From:** Bob Shea

**Sent:** Tuesday, May 16, 2023 5:28 PM

**To:** Katie Hagan <khagan@rpkgroup.com>; Mike Daly <mdaly@rpkgroup.com>

**Subject:** UNCG Data Issue to Discuss/Resolve

Katie and Mike,

We met with [UNCG data leaders] for a regularly scheduled meeting today and an issue came up that we'd like to discuss and resolve at our next check in meeting. and I think it is appropriate for to attend and discuss the technical details. We also wanted you to have the opportunity to discuss with Raven prior to the meeting and have her attend as well.

Paraphrasing here. The issue is the source [Datamart or Banner] and the aggregation of the data into the dashboard. both opined that this approach would leave us in the position of not easily being self sufficient with this data/dashboard post rpkg engagement. There seems to be a difference of opinion we need to iron out.

, I'm hoping I captured the substance of the issue here in this email.

We're looking forward to discussing and resolving. Thanks in advance.

**Bob Shea**  
**Vice Chancellor for Finance and Administration**  
**University of North Carolina Greensboro**  
**Mossman Building 254**



**From:** [Rick Staisloff](#)  
**To:** [Bob Shea](#)  
**Subject:** Catch Up  
**Date:** Wednesday, May 17, 2023 4:03:04 PM  
**Attachments:** [image001.png](#)

---

Sorry we missed each other today. I reached out to \_\_\_\_\_ and we'll get something rescheduled.

Rick

**rpk** GROUP  
from mission to market

Richard Staisloff | Senior Partner | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018



**From:** [Rick Staisloff](#)  
**To:**  
**Cc:** [Bob Shea](#)  
**Subject:** RE: Booking Time to Catch Up  
**Date:** Wednesday, May 17, 2023 7:13:21 PM  
**Attachments:** [image001.png](#)

---

I can do that. I will need to be a call, however. I can call him.

Thanks.



Richard Staisloff | Senior Partner | [rpK GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

---

**From:**  
**Sent:** Wednesday, May 17, 2023 4:13 PM  
**To:** Rick Staisloff <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>  
**Cc:** Bob Shea  
**Subject:** Re: Booking Time to Catch Up

Hey Rick,

Sorry about that, he was in Raleigh lobbying, he may have gotten tied up.

He has 5/25 2:00-3:00 would that work? Next week is full of Board meetings and Board of Governors meetings.

Let me know if this will work for you and I will calendar another call.

Thanks.

Get [Outlook for Android](#)

---

**From:** Rick Staisloff <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>  
**Sent:** Wednesday, May 17, 2023 3:21:37 PM  
**To:**  
**Subject:** RE: Booking Time to Catch Up

I wasn't able to connect with Bob at 3:00. I'm sure he just got pulled into something. Let me know

what some other windows might look like next week.

Regards,

Rick

**rpk** GROUP  
from mission to market

Richard Staisloff | Senior Partner | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

---

**From:** Rick Staisloff  
**Sent:** Friday, May 12, 2023 10:16 AM  
**To:**  
**Subject:** RE: Booking Time to Catch Up

Same to you!

**rpk** GROUP  
from mission to market

Richard Staisloff | Senior Partner | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

---

**From:**  
**Sent:** Friday, May 12, 2023 8:27 AM  
**To:** Rick Staisloff <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>  
**Cc:** Bob Shea  
**Subject:** Re: Booking Time to Catch Up

Happy to assist.

Hope you have a great weekend!

Best regards,

1202 Spring Garden Street

Greensboro, NC 27402



"In order to succeed, we must first believe that we can."

Nikos Kazantzakis

---

**From:** Rick Staisloff <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>

**Sent:** Friday, May 12, 2023 8:18 AM

**To:**

**Cc:** Bob Shea <[R\\_SHEA@uncg.edu](mailto:R_SHEA@uncg.edu)>

**Subject:** Re: Booking Time to Catch Up

That works. Thanks for getting this set up.

Regards,

Rick

On May 12, 2023 8:13 AM,

Hi Rick,

wrote:

I will send a calendar invite for a call on 5/17 at 3:00 pm.

Let me know if I can assist further.

Best regards,

1202 Spring Garden Street

Greensboro, NC 27402



"In order to succeed, we must first believe that we can."

Nikos Kazantzakis

---

**From:** Bob Shea

**Sent:** Thursday, May 11, 2023 9:50 PM

**To:** [rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)  
<[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>

**Subject:** Re: Booking Time to Catch Up

3 works

Get [Outlook for iOS](#)

---

**From:**

**Sent:** Thursday, May 11, 2023 7:51:03 PM

**To:** Bob Shea ; [rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>

**Subject:** Re: Booking Time to Catch Up

Hi Rick,

Hope you are doing well. 1:00-1:30 will work on 5/15, if you need more than 30 minutes, we may be able to work out a call on 5/17 at 3:00.

Please let me know which works best.

Thanks!

Get [Outlook for Android](#)

---

**From:** Bob Shea

**Sent:** Thursday, May 11, 2023 6:43:33 PM

**To:**

**Subject:** Fwd: Booking Time to Catch Up

Pls coordinate as a priority.

Bob Shea

Begin forwarded message:

**From:** Rick Staisloff <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>

**Date:** May 11, 2023 at 5:00:33 PM EDT

**To:** Bob Shea

**Subject: Booking Time to Catch Up**

Wanted to get some time on the books next week to catch up. Let me know if any of these windows work:

5/15 – 1

5/17 – 3

5/19 – 11:30

Rick

**rpk** GROUP  
from mission to market

Richard Staisloff | Senior Partner | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

**From:** [Rick Staisloff](#)  
**To:** [Bob Shea](#)  
**Subject:** RE: Catch Up  
**Date:** Thursday, May 18, 2023 5:07:57 PM  
**Attachments:** [image001.png](#)  
[image002.png](#)

---

No worries. You have a full time day job running UNCG. Apologies for just getting to this now, after a day of back to backs. I saw you just called, so I'm going to call you now and see if we can connect.

Rick

**rp**k GROUP  
from mission to market

Richard Staisloff | Senior Partner | [rp](#)k GROUP  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

---

**From:** Bob Shea  
**Sent:** Thursday, May 18, 2023 9:52 AM  
**To:** Rick Staisloff <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>  
**Subject:** RE: Catch Up

My fault! I was in Raleigh meeting with legislators begging for money...I got distracted. Does around 5 tonight work? I'll be in the car to the airport.

**Bob Shea**  
**Vice Chancellor for Finance and Administration**  
**University of North Carolina Greensboro**  
**Mossman Building 254**





**From:** Rick Staisloff <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>

**Sent:** Wednesday, May 17, 2023 4:03 PM

**To:** Bob Shea

**Subject:** Catch Up

Sorry we missed each other today. I reached out to \_\_\_\_\_ and we'll get something rescheduled.

Rick

**rpk** GROUP  
from mission to market

Richard Staisloff | Senior Partner | [rpk GROUP](http://rpkgroup.com)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Project Update  
**Date:** Friday, May 19, 2023 10:56:08 AM  
**Attachments:** [Outlook-taltqgry.png](#)

---

Hi [redacted] and Bob,

I'll hold on sharing the weekly project update until Monday as we have some meetings scheduled with [redacted] later today that should clarify the path forward for the dashboards. Thanks again for facilitating our gathering yesterday, there's been great momentum out of the conversations already.

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

**From:**  
**To:** [Mike Daly](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Project Update  
**Date:** Friday, May 19, 2023 10:57:51 AM  
**Attachments:** [Outlook-taltqgry.png](#)

---

Thanks Mike - we'll skip Monday as Bob is traveling and unavailable. Happy to chat next week if there's anything pressing.

Thank you both for meeting yesterday and I look forward to hearing outcomes of the conversation.

p.s. Asked [redacted] to reach out to you and [redacted] re: chair training. The communications to the chairs need to go out on Monday.

---

**From:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Sent:** Friday, May 19, 2023 10:55 AM  
**To:** [redacted] Bob Shea  
**Cc:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Subject:** UNCG/rpk Project Update

Hi [redacted] and Bob,

I'll hold on sharing the weekly project update until Monday as we have some meetings scheduled with [redacted] later today that should clarify the path forward for the dashboards. Thanks again for facilitating our gathering yesterday, there's been great momentum out of the conversations already.

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

**From:** [Rick Staisloff](#)  
**To:** [Bob Shea](#)  
**Cc:** [Laura Reames](#);  
**Subject:** UNCG - Progress Invoice 23-0053 - April - RPK GROUP  
**Date:** Monday, May 22, 2023 11:24:53 AM  
**Attachments:** [image001.png](#)  
[UNCG - rpk GROUP - Progress Invoice 23-0053 - April 2023.pdf](#)

---

Bob,

Attached please find our progress invoice for April.

Let me know if you have any questions, or require additional information to process this.

Regards,

Rick

**rpk** GROUP  
from mission to market

Richard Staisloff | Senior Partner | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

# rpk GROUP

626C Admiral Drive, Suite 511  
Annapolis, MD 21401, United States  
Tel: 410-591-9018  
rstaisloff@rpkgroup.com  
www.rpkgroup.com



## INVOICE

Robert Shea  
University of North Carolina-Greensboro  
1400 Spring Garden Ct  
Greensboro, NC 27412

TAX ID:  
INVOICE DATE: 5/15/2023  
INVOICE NO: 23-0053  
BILLING THROUGH: 4/30/2023

PROFESSIONAL SERVICES	HOURS	RATE	AMOUNT
Assoc ate	186.00	\$350.000	\$65,100.00
Pr nc pa	20.50	\$450.000	\$9,225.00
Sen or Assoc ate	20.50	\$350.000	\$7,175.00
Sen or Partner	1.00	\$450.000	\$450.00
<b>TOTAL SERVICES</b>	<b>228.00</b>		<b>\$81,950.00</b>
		<b>SUBTOTAL</b>	<b>\$81,950.00</b>
		<b>AMOUNT DUE THIS INVOICE</b>	<b>\$81,950.00</b>

This invoice is due on 6/14/2023

Richard Staisloff, Senior Partner  
rstaisloff@rpkgroup.com

Laura Reames, Billing Contact  
lreames@rpkgroup.com

Remit payment to:  
rpk GROUP  
626C Admiral Drive, Suite 511  
Annapolis, MD 21401

**From:** [Bob Shea](#)  
**To:** [Rick Staisloff](#)  
**Cc:** [Laura Reames](#);  
**Subject:** Re: UNCG - Progress Invoice 23-0053 - April - RPK GROUP  
**Date:** Monday, May 22, 2023 12:05:12 PM  
**Attachments:** [image001.png](#)

---

Ok to pay.

Bob Shea

On May 22, 2023, at 8:24 AM, Rick Staisloff <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)> wrote:

Bob,

Attached please find our progress invoice for April.

Let me know if you have any questions, or require additional information to process this.

Regards,

Rick

<[image001.png](#)>

Richard Staisloff | Senior Partner | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

<UNCG - rpk GROUP - Progress Invoice 23-0053 - April 2023.pdf>

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#);  
**Cc:** [Mike Daly](#)  
**Subject:** Weekly update (two days late)  
**Date:** Tuesday, May 23, 2023 12:52:02 PM  
**Attachments:** [UNCG Weekly Project Update 2023.05.23.pdf](#)

---

Hi Bob and \_\_\_\_\_,

I hope your week is off to a great start. Attached is our weekly update from last week -- we delayed it a few days to give us an opportunity to update you on the changes that have happened since our conversation with you two, \_\_\_\_\_ on Thursday, as well as the Chancellor's Task Force yesterday. We captured everything in the update, but here is a quick run down of where things stand:

1. The initial dashboard we created aimed to clean up some minor issues that are present in the data, particularly related to programs that are split across departments, departments that have credit hour activity but no faculty or financial data, and a few other things that are really normal when trying to do trend analyses and connect multiple data sources. \_\_\_\_\_ believe this manual edit of the data causes replicability concerns and hinders their ability to respond to faculty questions about data, so we are unwinding all of that clean up work and the dashboards will reflect the data 'as is' from your systems. This is not a major lift on our part, but will require a bit of time to revise on our end and then we'll need to do some additional vetting with \_\_\_\_\_ and others before it's ready for the Deans & other groups. We'll do our best to get all this done by end of next week. We'll also provide documentation to help users understand what might look 'off' due to the approach of representing the data as it is in the current systems.
2. UNCG IR would like to provide unit-level data for the program components of the dashboard (as opposed to summary data). Again, not a huge lift on our part, but our ability to meet the deadline of next week to have the dashboards done and ready depends on us getting that data from them this week.
3. Mike has still not heard from \_\_\_\_\_ regarding scheduling workshops with chairs.
4. Mike is working with UNCG IR to plan and schedule the dashboard roll out to the data team, deans, and the provost's task force.
5. The Chancellor's Task Force work is complete, so we can now shift to determining how rpk can support some of that implementation work. I put some ideas in the attached document. **We do not meet with you all again until June 8, so please let me know if you want to set up a quick meeting between now and the end of next week so we can get moving on the administrative services effort.**



Best,  
Katie

**rpk** GROUP  
from mission to market

Katie Hagan | Principal | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490



# UNCG & rpk GROUP

Status Report:  
May 23, 2023

rpk GROUP  
from mission to market

# Project Overview: May 15 – May 19

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>Katie attended Chancellor's Financial Sustainability Taskforce (5/12 &amp; 5/22).</li> <li>Rick met with _____ (5/15).</li> <li>Mike met with Data Stewards to review data decisions to date (5/15).</li> <li>UNCG/rpk Data Team reviewed approach to faculty data and viewed data in dashboard (5/15).</li> <li>Coordinated with UNCG IR to utilize unit level record data for academic programs to avoid potential confusion with aggregated student success data.</li> <li>Coordinated with UNCG IR to structure dashboards using 'current state' of data; doing so may mask totality of some program enrollments if users select department filters.</li> </ul>	<ul style="list-style-type: none"> <li>Re-setting course and faculty data in dashboards to align with shared 'current state' of data</li> <li>Incorporating unit level record data into dashboards</li> <li>Sharing documented processes and procedures related to dashboard data with UNCG IR.</li> <li>Sharing draft "About this Dashboard" and applied use-cases for dashboard data with UNCG IR for review.</li> <li>UNCG/rpk Data Team meeting (6/1).</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>UNCG IR shared test unit level record data</li> <li>Coordinated with rpk to utilize unit level record data for academic programs to avoid potential confusion with aggregated student success data.</li> <li>Coordinated with rpk to structure dashboards using 'current state' of data; doing so may mask totality of some program enrollments if users select department filters.</li> </ul>	<ul style="list-style-type: none"> <li>Scheduling opportunities for academic data dashboards as part of Chairs' workshops and trainings.</li> </ul>

Key					
	Complete	On Track	At Risk	Off Track	Not Started

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete															
Dashboard Development																Complete	Complete	Complete	Complete	Complete	At Risk	At Risk									
Dashboards Shared with Deans																							Complete	Complete	Complete						
Dashboards Shared with Chairs																							Complete	Complete	Complete						
Dashboards Shared with Taskforce																							Complete	Complete	Complete	Complete					
Faculty Workshops										Complete	Complete	Complete	Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk	At Risk	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete		

Due to the last-minute shift to unit-level records and a request to ‘unwind’ all data clean up that was done (per IR requests in meeting on 5/19), ability to meet this timeline will be dependent on receiving unit level records by 5/25 and will depend on the rpk and UNCG reviews of the dashboard output given the methodology shifts.

As of 5/23, Mike Daly has not heard from [redacted] about scheduling the chairs workshops.

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk														
Final Report & Recommendations																				At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk

The work of the Chancellor’s Task Force is complete. Project leaders & rpk need to outline the goals for the final report and recommendations in light of the task force report. rpk’s suggestion is to move forward with two key analyses that will help the HR team begin their work around staffing restructure, which is the primary recommendation in the report:

1. Organizational structure review and shared services recommendations
2. Spans & layers analysis

Key	Complete	On Track	At Risk	Off Track	Not Started
	Complete	On Track	At Risk	Off Track	Not Started



# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
UNCG/rpk Data Team meeting	Data Team members	6/1, 10:00am	
Project Leaders Meeting	[REDACTED], Bob, Katie and Mike	6/8, 9:00am	Review weekly project trackers

# Revised Timeline – Academic Data/Dashboards

Data	All Data Collected	Definitions and Methodology Confirmed	Data Validated	Beta Dashboard Launch and Feedback Period	Beta Dashboard Refined Based on Feedback
Academic Program List	3/24	4/18	4/27	6/5 – 6/30	7/3-7
Academic Structure	4/7	4/21	N/A		
Course Data	3/24	4/13	4/21		
Instructor Data	3/31	5/4	5/5		
Faculty Data	4/14	5/4	5/5		
Academic Program Data*	4/14	4/28	5/25		
Finance Data	3/24	5/19	5/26	TBD	TBD

\* See note on slide 4 re: academic program data.

Key	Complete	On Track	At Risk	Off Track	Not Started

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from mission to market



Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**From:** [Bob Shea](#)  
**To:**  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Weekly update (two days late)  
**Date:** Wednesday, May 24, 2023 7:59:34 AM

---

I have concerns about 1 and 2. Unwinding the work of a consultant we've hired as subject matter experts worries me. I think we need to discuss with internally before we discuss with rpk. As much as I respect , I think they are wrong here. Who do we listen to, to decide; our internal folks or the external experts? rpk does this for a living.

!

Next steps? I fear the unwinding is in process.

---

**From:** Katie Hagan <khagan@rpkgroup.com>  
**Date:** Tuesday, May 23, 2023 at 12:52 PM  
**To:** Bob Shea  
**Cc:** Mike Daly <mdaly@rpkgroup.com>  
**Subject:** Weekly update (two days late)

Hi Bob and ,

I hope your week is off to a great start. Attached is our weekly update from last week -- we delayed it a few days to give us an opportunity to update you on the changes that have happened since our conversation with you two, on Thursday, as well as the Chancellor's Task Force yesterday. We captured everything in the update, but here is a quick run down of where things stand:

1. The initial dashboard we created aimed to clean up some minor issues that are present in the data, particularly related to programs that are split across departments, departments that have credit hour activity but no faculty or financial data, and a few other things that are really normal when trying to do trend analyses and connect multiple data sources. believe this manual edit of the data causes replicability concerns and hinders their ability to respond to faculty questions about data, so we are unwinding all of that clean up work and the dashboards will reflect the data 'as is' from your systems. This is not a major lift on our part, but will require a bit of time to revise on our end and then we'll need to do some additional vetting with and others before it's ready for the Deans & other groups. We'll do our best to get all this done by end of next week. We'll also provide documentation to help users

understand what might look 'off' due to the approach of representing the data as it is in the current systems.

2. UNCG IR would like to provide unit-level data for the program components of the dashboard (as opposed to summary data). Again, not a huge lift on our part, but our ability to meet the deadline of next week to have the dashboards done and ready depends on us getting that data from them this week.
3. Mike has still not heard from \_\_\_\_\_ regarding scheduling workshops with chairs.
4. Mike is working with UNCG IR to plan and schedule the dashboard roll out to the data team, deans, and the provost's task force.
5. The Chancellor's Task Force work is complete, so we can now shift to determining how rpk can support some of that implementation work. I put some ideas in the attached document. **We do not meet with you all again until June 8, so please let me know if you want to set up a quick meeting between now and the end of next week so we can get moving on the administrative services effort.**

Best,  
Katie

**rpk** GROUP  
from mission to market

Katie Hagan | Principal | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490

**From:** [Rick Staisloff](#)  
**To:** [Bob Shea](#)  
**Subject:** Cancel Meeting for May 25th  
**Date:** Wednesday, May 24, 2023 7:50:08 AM  
**Attachments:** [image001.png](#)

---

Since we were able to connect in advance of your flying out to San Diego, I'm assuming we'll cancel the 5/25 call set up.

Hope you had a great trip.

Rick

**rpk** GROUP  
from mission to market

Richard Staisloff | Senior Partner | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#);  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Weekly update (two days late)  
**Date:** Wednesday, May 24, 2023 8:13:06 AM

---

Hi Bob,

It has -- we are proceeding with two versions of the dashboard to allow us and IR to see the variance. One will be the data 'as is' from the systems ( preference), the other is the one we've already built using the manually cleaned data. The time delay is less about the unwinding and more about the vetting of the 'as is' version to make sure everyone who will need to be explaining the dashboard is aware of the nuance and that we are communicating everything clearly throughout the dashboard before we release it to primary users. We are essentially just creating a new dashboard, which is the easy part, but need to repeat the vetting process with that new dashboard.

Thanks,  
Katie

---

**From:** Bob Shea  
**Sent:** Wednesday, May 24, 2023 8:01 AM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>;  
**Cc:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Subject:** Re: Weekly update (two days late)

Has the unwinding already happened?

---

**From:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Date:** Tuesday, May 23, 2023 at 12:52 PM  
**To:** Bob Shea  
**Cc:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Subject:** Weekly update (two days late)

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in the data, particularly related to programs that are split across departments, departments that have credit hour activity but no faculty or financial data, and a few other things that are really normal when trying to do trend analyses and connect multiple data sources. I believe this manual edit of the data causes replicability concerns and hinders their ability to respond to faculty questions about data, so we are unwinding all of that clean up work and the dashboards will reflect the data 'as is' from your systems. This is not a major lift on our part, but will require a bit of time to revise on our end and then we'll need to do some additional vetting with [redacted], [redacted] and others before it's ready for the Deans & other groups. We'll do our best to get all this done by end of next week. We'll also provide documentation to help users understand what might look 'off' due to the approach of representing the data as it is in the current systems.

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Best,  
Katie

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626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com) | 757-589-0490

**From:**  
**To:** [Katie Hagan](#); [Bob Shea](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Weekly update (two days late)  
**Date:** Wednesday, May 24, 2023 9:21:18 AM

---

All,

What I need is to ensure we (IT/IR) can replicate this process for the future AND that faculty and deans trust the data. Based on the discussion, I think what Katie has laid out is what we need to do to ensure this.

Happy to chat further,

---

**From:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Sent:** Wednesday, May 24, 2023 8:12 AM  
**To:** Bob Shea  
**Cc:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Subject:** Re: Weekly update (two days late)

Hi Bob,

It has -- we are proceeding with two versions of the dashboard to allow us and IR to see the variance. One will be the data 'as is' from the systems ( ), the other is the one we've already built using the manually cleaned data. The time delay is less about the unwinding and more about the vetting of the 'as is' version to make sure everyone who will need to be explaining the dashboard is aware of the nuance and that we are communicating everything clearly throughout the dashboard before we release it to primary users. We are essentially just creating a new dashboard, which is the easy part, but need to repeat the vetting process with that new dashboard.

Thanks,  
Katie

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**From:** Bob Shea >  
**Sent:** Wednesday, May 24, 2023 8:01 AM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>;  
**Cc:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Subject:** Re: Weekly update (two days late)

Has the unwinding already happened?

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**Date:** Tuesday, May 23, 2023 at 12:52 PM



**To:** Bob Shea  
**Cc:** Mike Daly <mdaly@rpkgroup.com>  
**Subject:** Weekly update (two days late)

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Best,  
Katie

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626C Admiral Drive, Suite 511, Annapolis, MD 21401  
khagan@rpkgroup.com | 757-589-0490

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Project Update and Notes for PRTF  
**Date:** Friday, May 26, 2023 12:41:33 PM  
**Attachments:** [Outlook-jk0emngq.png](#)  
[UNCG Weekly Project Update 2023.05.26.pdf](#)

---

Hi and Bob,

Attached please find the weekly project update. Of importance is that we're moving the initial sharing of the academic data dashboard with Deans out a week, to 6/12. This is directly related to the complexities of many of the academic program metrics that will be present in the dashboard. With the shared desire that the dashboards are trusted, this additional time will allow for a deeper final review by rpk, both of you and UNCG IR. Our revised sharing timeline:

- June 6<sup>th</sup> - internal review (rpk/UNCG project leaders, UNCG IR)
- June 12<sup>th</sup> - Academic Deans
- June 19<sup>th</sup> - Department Chairs and Program Directors
- June 26<sup>th</sup> - PRTF

, please note the following for the PRTF and for our conversation this afternoon:

- The metrics of apply/admit/enroll are intended as indicators for whether programs are attracting students to UNCG:
  - Apply - the number of students who at the point of initial application to UNCG indicated x-program as their intended major.
  - Admit - the number of students admitted to UNCG (not the x-program).
  - Enroll - the number of students who enrolled at UNCG (not the x-program).
- Pell-eligibility status will not be a slicer for academic programs in the dashboards
  - Available disaggregation to consider are: Race/Ethnicity; In-state/Out-of-state; Gender
    - Our recommendation would be in/out-state
- A four-year graduation rate will be available in the first iteration. As additional years are added a six-year graduation rate will become available.

Happy to talk through all of this in more detail as necessary.

Thanks again,

Mike Daly

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from mission to market

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mdaly@rpkgroup.com | Cell: 518-796-2209

UNCG



# UNCG & rpk GROUP

## Status Report: May 26, 2023

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# Project Overview: May 22 – May 26

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>Katie attended presentation findings from Chancellor's Financial Sustainability Taskforce (5/22).</li> <li>Updated academic data dashboards with re-mapped course and faculty data.</li> <li>Reviewed unit record level academic program data as shared by UNCG IR.</li> <li>Shared draft documentation process with UNCG IR for review and comments toward replicability and sustainability.</li> <li>Completed draft of Labor and Market Competition analysis.</li> <li>Completed draft of direct net revenue analysis.</li> </ul>	<ul style="list-style-type: none"> <li>Finalizing re-shared unit level record data into dashboards.</li> <li>processes and procedures related to dashboard data with UNCG IR.</li> <li>UNCG/rpk Data Team meeting (6/1).</li> <li>Project Leaders meeting to review direct net revenue analysis (6/2).</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>Shared unit record level data for academic programs.</li> <li>Shared state allocation per course subject CIP code for inclusion in direct net revenue analysis.</li> </ul>	<ul style="list-style-type: none"> <li>Scheduling opportunities for academic data dashboards as part of Chairs' workshops and trainings.</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	On Track	On Track	On Track														
Dashboard Development															On Track	On Track	On Track	On Track	On Track	On Track	On Track	At Risk	Not Started								
Dashboards Shared with Deans																						Off Track	Not Started	Not Started							
Dashboards Shared with Chairs																							Off Track	Not Started	Not Started						
Dashboards Shared with Taskforce																								Off Track	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	
Faculty Workshops										Complete	Complete	On Track	On Track	On Track	On Track	On Track	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	Not Started	Not Started	Not Started	Not Started	Not Started		

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May				June				July					
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete														
Final Report & Recommendations																				Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete

Note: rpk is providing support for the Chancellor’s Task Force on Financial Responsibility in place of what was originally scoped for the administrative services review. Katie is continuing to attend those meetings and engaging when asked (e.g., distributing and analyzing the stakeholder feedback survey). Stakeholder interviews and additional analysis and report drafting will be on hold until the Task Force work advances and rpk has a better idea of how to best add value.

Task Force shared final recommendations with the Chancellor on May 22.

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
UNCG/rpk Data Team meeting	Data Team members	6/1, 10:00am	
Project Leaders meeting	[redacted] Bob, Katie and Mike	6/1, 2:00pm	Direct Net Revenue review
Project Leaders meeting	[redacted] Bob, Katie and Mike	6/8, 9:00am	Review weekly project trackers

# Revised Timeline – Academic Data/Dashboards

Data	All Data Collected	Definitions and Methodology Confirmed	Data Validated	Beta Dashboard Launch and Feedback Period	Beta Dashboard Refined Based on Feedback
Academic Program List	3/24	4/18	4/27	6/12 – 6/30	7/3-7
Academic Structure	4/7	4/21	N/A		
Course Data	3/24	4/13	4/21		
Instructor Data	3/31	5/4	5/5		
Faculty Data	4/14	5/4	5/5		
Academic Program Data*	4/14	4/28	5/25		
Finance Data	3/24	5/19	5/26	N/A	N/A

\* Given the complexities of the metrics for academic programs being presented in the dashboards, a decision by rpk/UNCG IR has been made to spend an additional week reviewing data.

Key	Complete	On Track	At Risk	Off Track	Not Started

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Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Project Tracker  
**Date:** Friday, June 2, 2023 2:59:12 PM  
**Attachments:** [Outlook-5bly0keq.png](#)  
[UNCG Weekly Project Update 2023.06.02.pdf](#)

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Hi and Bob,

Attached is the weekly project tracker, much of this we discussed earlier today. Of note, I'll be sharing the Market and Labor competition report with you next week. This report incorporates publicly available data against UNCG's existing academic programs.

Have a great weekend,

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209



UNCG



# UNCG & rpk GROUP

## Status Report: June 2, 2023

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# Project Overview: May 29 – June 2

Overall Status	Project Status Overview & Key Items for Attention	
Off Track	UNCG IR is validating shared data related to academic programs. Until that is completed, no further work can proceed with academic data dashboards.	
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>Facilitated UNCG/rpk Data Team meeting (6/1)</li> <li>Completed Labor and Market Competition analysis.</li> <li>Completed and shared direct net revenue analysis with project leaders (6/2).</li> </ul>	<ul style="list-style-type: none"> <li>Finalizing re-shared unit level record academic program data into dashboards.</li> <li>Mike meeting with Academic Deans (6/7).</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>Shared unit record level data for academic programs.</li> <li>Shared updated state allocation per course subject CIP code for inclusion in direct net revenue analysis.</li> <li>Reviewed and confirmed documentation processes related to replicability as shared by rpk</li> </ul>	<ul style="list-style-type: none"> <li>Validating shared unit record level data for academic programs.</li> <li>Scheduling opportunities for academic data dashboards as part of Chairs' workshops and trainings.</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
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Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May				June				July					
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Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk														
Final Report & Recommendations																				Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete

*This portion of the work will continue upon UNCG project leaders receiving the Chancellor’s Financial Sustainability Taskforce’s final report and any agreed upon next steps with rpk GROUP.*

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Academic Deans Meeting	Mike and Academic Deans	6/7, 11:00am	
Project Leaders meeting	[REDACTED] Bob, Katie and Mike	6/8, 9:00am	
Project Status Meeting (monthly)	[REDACTED] and Rick Staisloff	6/12, 11:00am	

# Revised Timeline – Academic Data/Dashboards

Data	All Data Collected	Definitions and Methodology Confirmed	Data Validated	Beta Dashboard Launch and Feedback Period	Beta Dashboard Refined Based on Feedback
Academic Program List	3/24	4/18	4/27	6/12 – 6/30	7/3-7
Academic Structure	4/7	4/21	N/A		
Course Data	3/24	4/13	4/21		
Instructor Data	3/31	5/4	5/5		
Faculty Data	4/14	5/4	5/5		
Academic Program Data*	4/14	4/28	5/25		
Finance Data	3/24	5/19	5/26	N/A	N/A

\* Given the complexities of the metrics for academic programs being presented in the dashboards, a decision by rpk/UNCG IR has been made to spend an additional week reviewing data.

Key	Complete	On Track	At Risk	Off Track	Not Started

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# Thank you

Katie Hagan

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**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#)  
**Subject:** Discuss task force report & next steps  
**Date:** Monday, June 5, 2023 8:00:30 AM

---

Hi Bob,

I hope you had a nice weekend. I'd love to talk through the findings from the Task Force report and how we can best use our time to help you move administrative services recommendations forward. Let me know when you are ready to have that conversation and I can work with \_\_\_\_\_ to schedule.

Thanks,  
Katie

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**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Project Leaders Meeting - Agenda for 6/8  
**Date:** Tuesday, June 6, 2023 11:25:17 AM  
**Attachments:** [Outlook-sl0fcgeg.png](#)  
[UNCG MDO Memo Final\\_060123.pdf](#)

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Hi [redacted] and Bob,

As discussed last week we'll use the majority of our time this Thursday to introduce [redacted] to the approach being considered for a direct net revenue analysis.

I've also attached the Market and Labor competition report for your review. This report utilizes publicly available data (labor market projections and degrees conferred) as a frame for understanding the position of UNCG's current academic portfolio. We can certainly schedule more time to discuss this report, as needed.

[redacted], I will be at the Deans retreat tomorrow (virtually) to discuss the academic data dashboard. At present, we are still waiting for validated data from UNCG IR so the dashboard may be limited to my screen-sharing. As data is finalized and shared we will provide direct access for the Deans.

Thanks again,  
Mike Daly

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## Market Demand & Opportunity Analysis University of North Carolina Greensboro (UNCG)

June 1, 2023

The Market Demand and Opportunity (MDO) analysis is designed to provide forward-looking insight into the alignment between UNCG's current academic portfolio (all certificate and degree offerings) and expected employment opportunities in North Carolina over the next decade. The MDO analysis incorporates three different approaches to assess the alignment between UNCG's programs and projected labor market demand:

- **Program analysis** examines the labor market demand and wages for occupations that map to existing UNCG programs.
- **Competitor analysis** examines the strength of similar program offerings at other four-year competitor institutions in North Carolina.
- **Gap analysis** identifies growing occupations for which UNCG does not currently offer programs, and the competitor landscape surrounding the programs to prepare students for these jobs.

### ***Key highlights from these analyses show:***

- Two-thirds, or 121, of UNCG's academic programs are preparing students for occupations with a strong or moderate employment outlook and above median wages.
- Only about 20% of UNCG programs (39) have a weak employment outlook, but three-quarters of those programs (28) still prepare students for occupations with higher-than-median wages.
- The School of Nursing and the School of Business and Economics are most likely to offer programs (100% and 76%, respectively) that position graduates to access occupations with strong employment and wage opportunities.
- Programs with the weakest employment outlook are concentrated in the School of Music Department and the Consumer Apparel-Retail Studies Department in the School of Business and Economics.
- Thirty percent of UNCG's current programs (65) have a strong market position, with few competitor institutions offering similar programs, accompanied by evidence of robust student demand among the institutions that do offer those programs. In the Schools of Business and Economics and Education, more than 40% of the programs demonstrate a strong market position.
- Consideration for potential investment in new UNCG programs should include engineering (Civil, Industrial, and Mechanical) and programs that prepare students to work as Substance Abuse, Behavioral Disorder, and Mental Health Counselors. These high-wage occupations predict strong employment growth in North Carolina.

## North Carolina Statewide Employment Trends

North Carolina is projected to add 445,700 new jobs between 2021 and 2030, an increase of 9%. During this same period, more than 6.3 million job openings (705,600 annually) are projected from a combination of new job creation and workers leaving their current jobs as they exit the labor force or change occupations.

The fastest **new job growth** is in computer and mathematical occupations (21%) which includes college-level jobs, followed by healthcare support, personal care and service, and food preparation and serving occupations which primarily include non-college level jobs.

The greatest **number of job openings** over the next decade are expected in non-college level occupations, which tend to experience more worker turnover (see Figure 1). Among occupations with heavy concentrations of college-level jobs, those with the most job openings include management (36,400 annually), business and financial operations (36,000 annually), and educational instruction and library (30,400 annually).

### Program Analysis

The program analysis demonstrates how well UNCG's current academic programs serve the North Carolina state economy and the student populations enrolled post-graduation. In both the program and gap analyses, programs are organized into three employment categories:

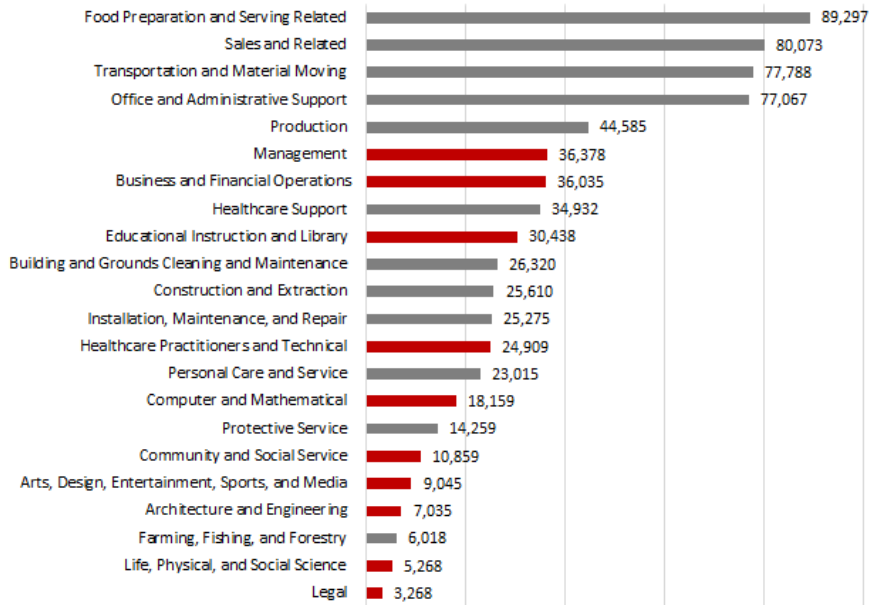
1. **Strong Employment Outlook** – at or above average new job growth *and* job openings
2. **Moderate Employment Outlook** - new job growth at or above average *and* below-average job openings **OR** below-average new job growth *and* job openings at or above average
3. **Weak Employment Outlook** - below average new job growth *and* below average job openings

and two wage areas:

1. **High Wage** - equal or exceeding the median annual wage
2. **Low Wage** - below median annual wage

Results from the program analysis show that the majority of UNCG's current academic programs (130 or 70%) have a strong or moderate employment outlook (see Table 1). These programs are equally distributed within these two employment outlook categories, and nearly all programs with strong employment outlook offer higher than median wages (34%), as do most programs with a moderate outlook (31%). Even programs with a weak employment outlook tend to offer high wages, but eight programs (4%) offer low wages and a weak employment outlook.

Figure 1: North Carolina Projected Annual Job Openings by Occupational Group, 2021-2030



Note: Red bars indicate the typical education level for that occupation includes a college degree.  
Source: rpk GROUP analysis of North Carolina Occupational Employment Projections, 2021-2030, North Carolina Department of Commerce.

**Table 1: Employment and Wage Outlook for UNCG Academic Programs**

Employment Outlook	Wage Category	Program Count	Program % Distribution
Strong Employment Outlook	High Wage	64	34%
	Low Wage	1	1%
<b>Strong Employment Outlook Total</b>		<b>65</b>	<b>35%</b>
Moderate Employment Outlook	High Wage	57	31%
	Low Wage	8	4%
<b>Moderate Employment Outlook Total</b>		<b>65</b>	<b>35%</b>
Weak Employment Outlook	High Wage	28	15%
	Low Wage	8	4%
	No Wage Category	3	2%
<b>Weak Employment Outlook Total</b>		<b>39</b>	<b>21%</b>
No Employment Category		17	9%
<b>No Employment Category Total</b>		<b>17</b>	<b>9%</b>
<b>Total</b>		<b>186</b>	<b>100%</b>
<b>Average New Job Growth in NC 9.1%   Average Annual Job Openings in NC 857   Median Annual Wage in NC \$47,745</b>			
<p>Note: The 'no employment category' includes 1) occupations without projections because they do not meet the North Carolina Department of Commerce's reporting threshold, or 2) occupations without a match in the Classification of Instructional Programs (CIP) – Standard Occupational Classification (SOC) crosswalk and a custom match could not be identified. All programs linked to the liberal arts index (occupations in which liberal arts graduates are often employed; see Appendix) are categorized as having a Strong Employment Outlook and High Wage; these programs are <b>not</b> included in this table.  Source: rpk GROUP analysis of UNCG Academic Programs data and NC Department of Commerce Employment Projections, 2021-2030.</p>			

UNCG's academic programs with the most promising employment outlook and high wages are found across six different colleges and at all award levels (See Table 2). Each of these programs prepares students for occupations where new job growth is projected to equal or exceed 25% and approximately 1,000 or more annual job openings.

Among the programs with the strongest outlook, bachelor's and master's degrees in **Computer Science** are linked to occupations where more than 10,000 job openings are expected annually. Master's degrees in **Informatics & Analytics** and bachelor's degrees in **Information Science** are both expected to provide access to occupations where more than 7,000 job openings are expected annually. Doctoral-level **Nursing** programs are preparing graduates for occupations projected to grow by 40% over the next decade and expected to offer about 1,100 job openings annually. Occupations tend to employ workers with different levels of educational preparation, so different degrees and certificates offered within similar programs may provide access to the same occupations. Differing education levels could lead to different levels of responsibility and wages earned within those occupations.

UNCG graduates with liberal arts degrees (see Appendix, Table A2) can also expect to find strong employment opportunities in North Carolina. rpk GROUP compiled an index of jobs where liberal arts graduates have been historically employed (see Appendix, Table A1). These occupations are collectively expected to grow 12.8% between 2021 and 2030 and offer 81,500 annual job openings, alongside above-median wages.

**Table 2: Top 10 UNCG Programs with Strong Employment Outlook and High Wages**

College/School	Department	Program	Award	Projected New Job Growth 2021-2030	Projected Average Annual Job Openings 2021-2030	Median Annual Wage 2021
Nursing	Nursing	Doctor of Nursing Practice	Doctorate	40%	1,103	\$94,458
Nursing	Nursing	Nursing	Doctorate	40%	1,103	\$94,458
Business and Economics	Consumer Apparel-Retail Studies	Global Apparel Supply Chain Management	Certificate	36%	969	\$63,640
Business and Economics	Info Systems and Supply Chain Management	Supply Chain Management	Certificate	36%	969	\$63,640
Interdisciplinary	Health Management	Health Management	Master's	32%	1,776	\$99,630
Arts and Sciences	Informatics and Analytics	Informatics & Analytics	Master's	29%	7,802	\$112,989
Education	Library & Information Science	Information Science	Bachelor's	28%	7,684	\$112,252
Arts and Sciences	Computer Science	Computer Science	Master's	27%	10,827	\$109,386
Arts and Sciences	Computer Science	Computer Science	Bachelor's	27%	11,241	\$107,781
Health and Human Sciences	Public Health Education	Community Health Education	Doctorate	25%	1,468	\$105,250
<p>Note: Programs aligned with occupations accessible to liberal arts graduates are not included in this table because none were in the top 10 ranking. Occupations may map to multiple programs because there are various degrees and programs that prepare students to access a particular occupation; in these instances, different programs may display the same employment and wage data.                      Source: rpk GROUP analysis of UNCG Academic Programs data and NC Department of Commerce Employment Projections, 2021-2030.</p>						

UNCG also offers several programs with weak employment and earnings prospects (see Table 3). These programs are concentrated in the College of Visual/Performing Arts and the School of Business and Economics. Employment opportunities for certificates, master's and doctoral degrees in music, performance, and study have below average job growth, annual openings, and wages. Similarly, the five programs offered in the department of consumer apparel-retail studies are preparing students across all degree levels for occupations with little expected growth.

**Table 3: UNCG Programs with Weak Employment Outlook and Low Wages**

College/School	Department	Program	Award	Projected New Job Growth 2021-2030	Projected Average Annual Job Openings 2021-2030	Median Annual Wage 2021
Visual/Performing Arts	School of Music	Music	Doctorate	8%	815	\$35,726
Visual/Performing Arts	School of Music	Performance	Master's	8%	815	\$35,726
Visual/Performing Arts	School of Music	Music Performance Study	Certificate	8%	529	\$ 14,442
Business and Economics	Consumer Apparel-Retail Studies	Consumer, Apparel, and Retail Studies	Bachelor's	1%	12	\$ 31,260
Business and Economics	Consumer Apparel-Retail Studies	Consumer, Apparel, and Retail Studies	Doctorate	1%	15	\$31,260
Business and Economics	Consumer Apparel-Retail Studies	Global Fashion Industry Management	Certificate	1%	12	\$31,260
Business and Economics	Consumer Apparel-Retail Studies	Retail Consumer Data Analytics	Certificate	1%	12	\$31,260
Business and Economics	Consumer Apparel-Retail Studies	Retail Studies	Master's	1%	12	\$31,260
<p>Note: Occupations may map to multiple programs because there are various degrees and programs that prepare students to access a particular occupation; in these instances, different programs may display the same employment and wage data.</p>						

As we look within individual UNCG schools, it's clear that all schools (except nursing) offer programs with strong, moderate, and weak employment outlooks (see Table 4). All Nursing school programs are well-positioned to prepare graduates for occupations with strong employment opportunities and high wages. The School of Business and Economics also offers a high concentration of programs (74%) with similarly strong employment growth and wages.

The College of Visual/Performing Arts offers programs with a variety of employment outlooks, but about 60% of their programs are linked to occupations with a weak employment outlook; even so, half of those programs still offer high wages. The Joint School of Nanoscience/Nanoengineering is the only college or school without programs linked to occupations with a strong employment outlook; three out of seven programs it offers have a weak employment outlook, although all programs are linked to occupations that offer higher than median wages.

**Table 4: Employment and Wage Outlook Distribution Across Colleges and Schools (Program Count & Distribution)**

Employment Outlook	Wage Category	Arts and Sciences	Visual/ Performing Arts	Health and Human Sciences	Nanoscience / Nano-engineering	Business and Economics	Education	Nursing
Strong Employment Outlook	High Wage	18 (35%)	1 (4%)	5 (15%)		26 (74%)	6 (21%)	8 (100%)
	Low Wage			1 (3%)				
Moderate Employment Outlook	High Wage	20 (38%)	4 (17%)	15 (44%)	2 (29%)	1 (3%)	16 (55%)	
	Low Wage	1 (2%)	1 (4%)	6 (18%)				
Weak Employment Outlook	High Wage	7 (13%)	8 (35%)	3 (9%)	3 (43%)	2 (6%)	5 (17%)	
	Low Wage		3 (13%)			5 (14%)		
	No Wage Category		3 (13%)					
No Employment Category	No Wage Category	6 (12%)	3 (13%)	4 (12%)	2 (29%)	1 (3%)	2 (7%)	
<b>Total</b>		<b>52 (100%)</b>	<b>23 (100%)</b>	<b>34 (100%)</b>	<b>7 (100%)</b>	<b>35 (100%)</b>	<b>29 (100%)</b>	<b>8 (100%)</b>

Note: There are 188 total programs shown in this table because two programs are affiliated with more than one college/school.

Source: rpk GROUP analysis of UNCG Academic Programs data and NC Department of Commerce Employment Projections, 2021-2030.

## Competitor Analysis

The competitor analysis examines the market viability and opportunity of the academic programs currently offered by UNCG. Information from the National Student Clearinghouse was used to identify UNCG's 10 largest competitor institutions, all of which are located in North Carolina (see Appendix, Table A3). By connecting competitor program awards to similar programs at UNCG, the market saturation (number of competitors offering the program) and program demand (competitor growth in degree and certificates awarded) can be assessed within the competitor space. Programs are organized into three categories informed by market saturation and competitor growth in degree and certificate awards:

1. **Strong Market Opportunity** - below 50% market saturation & at least 50% of competitors offering the program demonstrate positive growth



2. **Moderate Market Opportunity** - below 50% market saturation & less than 50% of competitors offering the program demonstrate positive growth OR Above 50% market saturation & at least 50% of competitors offering the program demonstrate positive growth
3. **Limited Market Opportunity** - above 50% market saturation & less than 50% of competitors offering the program demonstrate positive growth

Results from the competitor analysis show that 30% of UNCG’s current programs are strongly positioned to take advantage of market opportunities, with anticipated student interest and few offerings among competitor institutions (see Table 5). Two-thirds of these programs offer bachelor’s degree (11%) or postbaccalaureate certificates (9%). Another quarter of UNCG’s programs indicate moderate market opportunities, with most at the bachelor’s (11%) and master’s (9%) degree levels. Only 11% of UNCG’s programs are expected to have limited market opportunity because of strong competition or limited visible demand among the university’s competitors.

**Table 5: Market Opportunity for UNCG Academic Programs**

Market Opportunity	Award	Program Count	Program % Distribution
Strong Market Opportunity	Bachelor's	23	11%
	Postbaccalaureate certificate	20	9%
	Master's	14	7%
	Doctorate	8	4%
<b>Strong Market Opportunity Total</b>		<b>65</b>	<b>30%</b>
Moderate Market Opportunity	Bachelor's	24	11%
	Postbaccalaureate certificate	3	1%
	Master's	19	9%
	Post-master's certificate	1	0%
	Doctorate	9	4%
<b>Moderate Market Opportunity Total</b>		<b>56</b>	<b>26%</b>
Limited Market Opportunity	Bachelor's	14	7%
	Master's	9	4%
<b>Limited Market Opportunity Total</b>		<b>23</b>	<b>11%</b>
No Competitor Data	Bachelor's	4	2%
	Postbaccalaureate certificate	39	18%
	Master's	14	7%
	Post-master's certificate	3	1%
	Doctorate	11	5%
<b>No Competitor Data Total</b>		<b>71</b>	<b>33%</b>
<b>Total</b>		<b>215</b>	<b>100%</b>

Note: 'No Competitor Data' indicates a competitor could offer the program, but completions are <1 across FY18 – FY21; alternately, competitors may classify a similar program using a different CIP code.  
Source: rpk GROUP analysis of IPEDS Completions Survey, 2018-2021.

In the School of Business and Economics more than 40% of the programs are expected to have a strong market position (see Table 6). In addition, 30% or more of programs offered in the College of Arts and Sciences, Schools of Health and Human Sciences, Education, and Joint School of Nanoscience/Nanoengineering are strongly positioned to serve student



interested in the current market environment. The Colleges of Arts and Sciences, offers the greatest number of programs (12, or 17%) with the limited market opportunities because of low student demand or strong existing competition.

**Table 6: Market Opportunity Distribution Across Colleges and Schools (Program Count and Distribution)**

Market Opportunity	Arts and Sciences	Visual/ Performing Arts	Health and Human Sciences	Nanoscience / Nano-engineering	Business and Economics	Education	Nursing
Strong Market Opportunity	21 (30%)	3 (10%)	13 (36%)	2 (29%)	15 (43%)	11 (38%)	
Moderate Market Opportunity	23 (32%)	10 (32%)	11 (31%)		4 (11%)	6 (21%)	3 (38%)
Limited Market Opportunity	12 (17%)	3 (10%)	1 (3%)		2 (6%)	4 (14%)	1 (13%)
No Competitor Data	15 (21%)	15 (48%)	11 (31%)	5 (71%)	14 (40%)	8 (28%)	4 (50%)
<b>Total</b>	<b>71 (100%)</b>	<b>31 (100%)</b>	<b>36 (100%)</b>	<b>7 (100%)</b>	<b>35 (100%)</b>	<b>29 (100%)</b>	<b>8 (100%)</b>

Note: 'No Competitor Data' indicates competitors could offer a program, but awards are <1 across FY18 – FY21; alternately, competitors may use a different CIP code to classify a similar program. There are 217 total programs shown in this table because two programs are affiliated with more than one college/school.  
 Source: rpk GROUP analysis of IPEDS Completions Survey, 2018-2021.

### Gap Analysis

The gap analysis takes a statewide perspective on employment growth. It looks to identify occupations where strong or moderate job growth is expected in North Carolina, but UNCG does not offer any programs preparing students for those jobs. The gap analysis highlights areas of consideration for potential academic program development.

The gap analysis reveals eight occupations at various degree levels that could be candidates for program consideration (see Table 7). The occupations are centered in health care, engineering, and the legal field. Development of these programs may require creating new colleges, schools, or departments since few are aligned with existing UNCG schools.

**Table 7: Occupations with Strong/Moderate Employment Outlook, High Wages, and No Affiliated UNCG Program**

Occupation Code (SOC)	Occupation	Typical Educational Requirement	Projected New Job Growth 2021-2030	Projected Average Annual Job Openings 2021-2030	Median Annual Wage 2021
29-1071	Physician Assistants	Master's	29%	624	\$107,330
21-1018	Substance Abuse, Behavioral Disorder, and Mental Health Counselors	Bachelor's	24%	1,349	\$48,640
29-1123	Physical Therapists	Doctoral/ Professional	19%	532	\$79,240
17-2112	Industrial Engineers	Bachelor's	16%	818	\$81,380
17-2051	Civil Engineers	Bachelor's	14%	1,107	\$78,960
17-2141	Mechanical Engineers	Bachelor's	12%	711	\$79,570
23-1011	Lawyers	Doctoral/ Professional	11%	1,133	\$105,140
29-2010	Clinical Laboratory Technologists and Technicians	Bachelor's	9%	1,077	\$48,000

Note: Table includes high-wage occupations with a strong employment outlook, and high-wage occupations with a moderate employment outlook where new job growth is above average and annual job openings are greater than 500. Occupations accessible with a liberal arts degree are excluded from this table.  
 Source: rpk GROUP analysis of UNCG Academic Programs data and NC Department of Commerce Employment Projections, 2021-2030.

In the health field, **Physician Assistants and Physical Therapists** both require graduate-level programs, while **Clinical Laboratory Technologists and Technicians** typically earn bachelor’s degrees. **Substance Abuse, Behavioral Disorder, and Mental Health Counselors** are other health-related occupations requiring bachelor’s degrees.

Within engineering, **Civil and Mechanical Engineers** are expected to offer strong employment opportunities and require only bachelor’s degree programs. While **Lawyers** will have similar opportunities, preparing students for those opportunities would require the creation of a post-graduate professional school.

**Table 8: Competitor Analysis for Areas Identified as UNCG Program Gaps**

Occupation	Programs Linked to Occupation	UNCG Competitors Offering the Program	Average Awards per Year	Number of Competitors by Growth Trend 2017-2021		
				Positive	None	Negative
<b>Strong Employment Outlook</b>						
Civil engineers	Civil Engineering, General - Bachelor's	2	118	2	0	0
	Civil Engineering, General - Master's	2	41	2	0	0
	Construction Engineering - Bachelor's	1	16	0	1	0
	Construction Engineering - Master's	1	4	1	0	0
Clinical laboratory technologists and technicians	Clinical Laboratory Science/Medical Technology/Technologist - Bachelor's	3	25	2	0	1
	Clinical Laboratory Science/Medical Technology/Technologist - Master's	1	5	0	0	1
Lawyers	Law – Doctorate/Professional	2	162	0	0	2
	Programs for Foreign Lawyers - Master's	1	2	0	0	1
Substance abuse, behavioral disorder, and mental health counselors	Mental Health Counseling/Counselor - Master's	2	24	1	0	1
	Substance Abuse/Addiction Counseling – Postbaccalaureate certificate	3	8	2	1	0
	Trauma Counseling - Postbaccalaureate certificate	1	5	1	0	0
<b>Moderate Employment Outlook</b>						
Industrial engineers	Engineering/Industrial Management - Bachelor's	1	15	1	0	0
	Engineering/Industrial Management - Master's	2	20	1	0	1
	Industrial Engineering - Bachelor's	1	92	1	0	0
	Industrial Engineering - Master's	1	56	1	0	0
	Manufacturing Engineering - Master's	1	43	1	0	0
	Systems Engineering - Bachelor's	1	47	0	0	1
Mechanical engineers	Mechanical Engineering - Bachelor's	2	236	1	0	1
	Mechanical Engineering - Master's	2	63	1	0	1
	Mechanical Engineering – Postbaccalaureate certificate	1	1	1	0	0
Physical therapists	Kinesiotherapy/Kinesiotherapist - Master's	1	13	0	0	1
	Physical Therapy/Therapist - Doctorate	4	34	2	1	1
Physician assistants	Physician Associate/Assistant - Master's	2	26	1	0	1
<i>Source: rpk GROUP analysis of NC Department of Commerce Employment Projections, 2021-2030 and IPEDS Completions Survey, 2017-2021.</i>						

This analysis also considered other state colleges and universities that may already offer programs preparing students for these jobs. It includes the same ten institutions included in the competitor analysis (see Appendix, Table A3). The data show that very few UNCG competitors, generally one or two institutions, offer the programs that will prepare students for these growing occupations. Only one program, a physical therapist doctoral degree, was offered by almost half of the competitor institutions (see Table 8).

The **civil, mechanical, and industrial engineering** programs produce the largest number of degrees across the competitors, along with **law** programs. While this signals that sizable programs already exist elsewhere in the state, the trend among degree completions in the engineering programs is largely positive, suggesting there is strong student demand. However, all the competitors offering law programs showed a negative trend in completions, suggesting weak student demand.

Six competitors offer programs preparing students for jobs as **Substance Abuse, Behavioral Disorder, and Mental Health Counselors**. They produce fewer graduates, but the positive trend in degree production for these programs suggests opportunity may be available in the higher education marketplace for more programs.

## Conclusion

The MDO analysis collectively shows that the majority of UNCG's academic programs are strongly or moderately aligned with expected employment opportunities in North Carolina over the next decade. And regardless of the employment outlook, 88% of UNCG programs are expected to provide students with access to occupations that offer above median wages. Programs with the strongest employment outlook are concentrated in Nursing, Business and Economics, and Computer Science. However, the School of Business and Economics, along with the School of Visual/Performing Arts, also offers multiple programs with poor employment prospects over the next decade.

An examination of programs offered by UNCG's competitors indicates that 30% of UNCG's programs are expected to offer strong market opportunities going forward, meaning the current competitor landscape is not currently saturated and there is evidence of student demand. The strongest opportunities for continued or increased investment in current UNCG programs are among the bachelor's degree program offerings, and particularly in the Schools of Business and Economics, and Education. The College of Arts and Sciences offers a variety of programs with strong and moderate market opportunities, but also houses the largest number of programs with weak market opportunities.

UNCG could consider adding new bachelor's degree programs in civil, industrial, and mechanical engineering to prepare students for these engineering jobs, which are projected to offer high wages and strong employment opportunities over the next decade. However, those new programs would be a significant investment for UNCG. New bachelor's degree programs preparing students for jobs as Substance Abuse, Behavioral Disorder, and Mental Health Counselors may also warrant consideration.

## Appendix

The goal of the MDO’s **program analysis** is to determine how well programs currently offered at UNCG serve 1) the North Carolina state economy and 2) the student populations enrolled post-graduation. The MDO **gap analysis** uses the same information but examines it from a different perspective and identifies 1) the occupations offering the greatest well-paid employment opportunities in North Carolina over the next decade, and 2) whether UNCG currently offers programs to prepare students for those jobs.

The **competitor analysis** also examines the landscape outside of UNCG by looking at which other higher education competitor institutions may be offering similar academic programs and evaluating the comparative strength of those programs. This information 1) identifies programs in which UNCG may or may not have a competitive advantage, and 2) identifies potential areas of market growth or market saturation, which can inform decisions around investments in current or new academic programs.

### **Program and Gap Analysis Methodology**

The MDO analysis uses publicly available employment projections and wage data and connects it to academic programs at UNCG using a crosswalk. The employment and wage data are from North Carolina’s Department of Commerce and the analysis metrics include: 2021-2030 projected new job growth, 2021-2030 projected average annual job openings, and 2021 median annual wages. rpk GROUP created an enhanced version of the Department of Education’s CIP-SOC<sup>1</sup> crosswalk, integrating occupational education and experience requirements from the Bureau of Labor Statistics.

The North Carolina occupations and the associated employment and wage data were attached to the crosswalk by SOC code, and then the UNCG academic programs were attached by CIP code. The analyses were conducted at the six-digit CIP code and degree type (bachelor’s degree, postbaccalaureate certificate, master’s degree, post-master’s certificate, and doctorate degree).

### *Liberal Arts Index*

rpk GROUP's Liberal Arts Index accounts for the varied employment opportunities available to liberal arts graduates and incorporated it into the custom CIP-SOC crosswalk. The method identifies ‘liberal arts’ programs, identifies jobs accessible to students with liberal arts degrees (see Table A1), and applies the index to all identified liberal arts programs at the bachelor’s degree award level (see Table A2).

**Table A1: rpk GROUP Liberal Arts Index Occupations (Bachelor’s Degrees)**

Advertising and promotions managers	Mental health counselors
Sales managers	Substance abuse, behavioral disorder, and mental health counselors
Administrative services managers	Mental health and substance abuse social workers
Education administrators, preschool and childcare center/program	Child, family, and school social workers
Education administrators, all other	Social workers, all other
Medical and health services managers	Health educators
Social and community service managers	Probation officers and correctional treatment specialists
Managers, all other	Community and social service specialists, all other

<sup>1</sup> ‘CIP’ codes are standard ‘classification of instructional programs’ codes assigned to each program. ‘SOC’ codes are ‘standard occupational codes’ assigned to all occupations. This analysis uses the current 2020 CIP codes and 2018 SOC codes.

Agents and business managers of artists, performers, and athletes Buyers and purchasing agents Buyers and purchasing agents, farm products Wholesale and retail buyers, except farm products Purchasing agents, except wholesale, retail, and farm products Compliance officers Cost estimators Human resources specialists Labor relations specialists Logisticians Management analysts Meeting, convention, and event planners Fundraisers Compensation, benefits, and job analysis specialists Training and development specialists Market research analysts and marketing specialists Business operations specialists, all other Property Appraisers and Assessors Appraisers and assessors of real estate Budget analysts Credit analysts Financial analysts Personal financial advisors Insurance underwriters Financial examiners Credit counselors Loan officers Tax examiners and collectors, and revenue agents Financial specialists, all other Computer systems analysts Information security analysts Computer programmers Software developers Software quality assurance analysts and testers Web developers Database administrators Network and computer systems administrators Computer network support specialists Computer occupations, all other Operations research analysts Miscellaneous mathematical science occupations Mathematical science occupations, all other Foresters Geographers Forensic science technicians Substance abuse and behavioral disorder counselors Clergy Directors, religious activities, and education	Religious workers, all other Arbitrators, mediators, and conciliators Paralegals and legal assistants Legal support workers, all other Career/technical education teachers, postsecondary Preschool teachers, except special education Kindergarten teachers, except special education Elementary school teachers, except special education Middle school teachers, except special and career/technical education Career/technical education teachers, middle school Secondary school teachers, except special and career/technical education Career/technical education teachers, secondary school Adult basic education, adult secondary education, and English as a second language instructors Teachers and instructors, all other, except substitute teachers Substitute teachers, short-term Teachers and instructors, all other Museum technicians and conservators Education instruction and library workers, all other Fine artists, including painters, sculptors, and illustrators Special effects artists and animators Fashion designers Graphic designers Set and exhibit designers Designers, all other Actors Producers and directors Coaches and scouts Music directors and composers Broadcast announcers and radio disc jockeys News Analysts, Reporters, and Journalists Public relations specialists Editors Technical writers Writers and authors Interpreters and translators Broadcast technicians Sound engineering technicians Camera operators, television, video, and film Film and video editors Securities, commodities, and financial services sales agents Sales representatives, wholesale and manufacturing, technical and scientific products Sales engineers Proofreaders and copy markers Statistical assistants
--	--

**Table A2: UNCG Liberal Arts Bachelor’s Degree Programs**

African American and African Diaspora Studies	Liberal and Interdisciplinary Studies
Anthropology	Media Studies
Art	Music
Arts Administration	Peace and Conflict Studies
Classical Studies	Performance
Communication Studies	Philosophy
Dance (Choreography and Performance)	Political Science
Dance Studies	Psychology
Drama	Religious Studies
English	Social Work
Geography	Sociology
History	Spanish
Integrated Professional Studies	Studio Art
Interior Architecture	Women’s, Gender, and Sexuality Studies
Languages, Literatures, and Cultures	

**Competitor Analysis Methodology**

The competitor analysis includes institutions identified from UNCG-provided data originally obtained from the National Student Clearinghouse. Ten competitors were identified based on the number of students who applied to UNCG but did not attend, and instead enrolled in other institutions. While not intentionally limited to North Carolina, UNCG’s largest competitors were located within the state (see Table A3).

**Table A3: UNCG Competitor Analysis Institutions**

<b>UNCG Competitor Institutions</b>	<b>Number UNCG Applicants (Entering into the 2022 Cohort Year) Who Enrolled at Competitor Four-Year Institutions</b>
Appalachian State University	571
East Carolina University	522
Fayetteville State University	84
North Carolina Central University	123
North Carolina State University at Raleigh	564
University of North Carolina at Chapel Hill	980
University of North Carolina at Charlotte	420
University of North Carolina Wilmington	261
Western Carolina University	166
Winston-Salem State University	92

The competitor analysis uses publicly available data on degrees and certificates awarded from the Integrated Postsecondary Education Data System (IPEDS). The data on competitor awards is connected to academic programs currently offered at UNCG, as well as programs identified in the gap analysis as potential opportunities for new program creation. The unit of analysis and the connection point between UNCG programs and competitor programs is the 6-digit CIP code plus the type of award (bachelor’s degree, postbaccalaureate certificate, master’s degree, post-master’s certificate, or doctoral/professional degree).



For each program, analysis metrics include market saturation and program demand calculated using 2018-2021 IPEDS degree and certificate awards data.

- Market Saturation = # institutions offering program/10
- Program Demand = Ratio of competitors offering the program demonstrating positive growth

Seventy of UNCG’s program offerings were not offered as competing programs by the 10 competitor institutions (see Table A4).

**Table A4: UNCG Academic Programs Without Competitor Data**

Analytical Instrumentation - Certificate Consumer, Apparel, and Retail Studies - Doctorate Global Fashion Industry Management - Certificate Retail Consumer Data Analytics - Certificate Retail Merchandising Management - Certificate Retail Studies - Master's Applied Statistics - Master's Athlete Well-Being - Certificate Chemistry and Biochemistry - Doctorate Synthetic Biology - Certificate Economics - Doctorate Leadership in Infant and Toddler Learning - Certificate Communication Sciences and Disorders - Doctorate Computational Mathematics - Doctorate Information Systems and Supply Chain Management - Bachelor's Information Technology Development - Certificate Information Technology Management - Certificate Special Endorsement in Computer Education - Certificate Dance - Certificate Dance - Master's Business Analytics - Certificate Dance Education - Master's Birth-Kindergarten Initial Licensure - Certificate Birth-Kindergarten Interdisciplinary Studies in Education and Development - Master's Quantitative Business Economics - Certificate Instructional Coaching - Certificate Interpreting, Deaf Education and Advocacy Services - Bachelor's Educational Assessment - Certificate Educational Research, Measurement, and Evaluation - Doctorate Educational Research, Measurement, and Evaluation - Master's e-Learning - Certificate Environmental Humanities - Certificate Kinesiology - Doctorate Historic Preservation - Certificate Human Development and Family Studies - Bachelor's	Human Development and Family Studies - Doctorate Genetic Counseling - Master's Informatics & Analytics - Master's Interior Architecture - Master's International Business - Master's Global Studies - Certificate Information Systems - Doctorate Advanced Materials - Certificate Medical Science - Certificate Music Education - Certificate Historical Keyboard Performance - Certificate Jazz Studies - Certificate Music - Doctorate Music Education - Doctorate Music Technology - Certificate Music Composition - Certificate Music Theory - Certificate Music Theory - Master's Music Theory Pedagogy - Certificate Ethnomusicology - Certificate Musicology - Certificate Advanced Practice Foundations - Certificate Nursing - Certificate Nursing - Master's Nursing Leadership and Management - Certificate Dietetic Internship - Certificate Nanoscience - Certificate Urban and Economic Development - Certificate Workplace Wellness - Certificate Languages, Literatures, and Cultures - Master's Cultural Foundations and Social Justice Education - Certificate Geography, Secondary Education - Bachelor's Climate Justice - Certificate Sustainability - Certificate Taxation - Certificate Women’s, Gender, and Sexuality Studies - Master's
---	--

**From:**  
**To:** [Mike Daly](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Project Leaders Meeting - Agenda for 6/8  
**Date:** Tuesday, June 6, 2023 11:43:35 AM  
**Attachments:** [Outlook-sl0fcqeg.png](#)

---

Hi Mike,

I'll review more carefully but at first glance, I would remove the recommendation re: engineering as we won't be able to get these approved by the system office given our mission and competition for such programs in the state. Thanks,

University of North Carolina Greensboro

Greensboro, NC 27412

---

**From:** Mike Daly <mdaly@rpkgroup.com>  
**Sent:** Tuesday, June 6, 2023 11:24 AM  
**To:** Bob Shea  
**Cc:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** UNCG/rpk Project Leaders Meeting - Agenda for 6/8

Hi [redacted] and Bob,

As discussed last week we'll use the majority of our time this Thursday to introduce [redacted] to the approach being considered for a direct net revenue analysis.

I've also attached the Market and Labor competition report for your review. This report utilizes publicly available data (labor market projections and degrees conferred) as a frame for understanding the position of UNCG's current academic portfolio. We can certainly schedule more time to discuss this report, as needed.

[redacted], I will be at the Deans retreat tomorrow (virtually) to discuss the academic data dashboard. At present, we are still waiting for validated data from UNCG IR so the dashboard may be limited to my screen-sharing. As data is finalized and shared we will provide direct access for the Deans.

Thanks again,  
Mike Daly

# rpk GROUP

from mission to market

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mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Katie Hagan](#)  
**To:**  
**Cc:** [Bob Shea](#)  
**Subject:** rpk Analysis Support Next Steps  
**Date:** Wednesday, June 7, 2023 9:59:34 AM

---

Hi

I hope all is well! I just met with Bob to discuss how rpk can use the remainder of our time with UNCG to support some additional analyses that are complimentary to the task force report. You and I talked about this a couple of weeks ago as well. I think the best opportunities are:

1. An organizational structure review and recommendations - We already have the org charts from a couple of months ago and started on this before the task force work began, so we can easily pick this back up.
2. A spans and layers analysis - I'll just need to work with you (or someone on your team) to get the personnel data to complete that analysis.
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The end result of this work would be a short report with findings, recommendations, and savings or investments attached to each recommendation.

Let me know your thoughts, and if this aligns with what you had in mind, we can set up some time to iron out the data request.

Thanks,  
Katie

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626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Project Leaders Meeting - Agenda for 6/8  
**Date:** Wednesday, June 7, 2023 3:15:34 PM  
**Attachments:** [Outlook-sl0fcqeg.png](#)

---

Thanks, I look forward to your comments after a closer reading. You are correct, The Market and Labor competition report should be viewed in the balance against other available data. I appreciate your comments regarding how potential market opportunities may not be possible given internal and external constraints. In this case, even though engineering does demonstrate positive labor outlooks and despite existing programs at other institutions, and continued student demand, it may not be the path UNCG pursues. Saying no is an answer!

Following up on the 4-year graduation metric I shared with you and the deans this morning: From my understanding of the UNC System dashboard, a cohort approach is used for institutional reporting of graduation rates as well (i.e., the number of students who start at a point in time at a university are looked at 2, 3, 4, 5, etc., years later to determine what percent graduated). The metric in the dashboard we've developed goes a level deeper than institutional graduation rates and looks at program graduation rates. Over time, understanding this metric's trajectory and where strengths/weaknesses exist in the academic portfolio reside is critical information to have. Happy to talk more about this, as always.

Thanks again,  
Mike Daly  
rpk GROUP

---

**From:**  
**Sent:** Tuesday, June 6, 2023 11:43 AM  
**To:** Mike Daly <mdaly@rpkgroup.com>; Bob Shea  
**Cc:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** Re: UNCG/rpk Project Leaders Meeting - Agenda for 6/8

Hi Mike,  
I'll review more carefully but at first glance, I would remove the recommendation re: engineering as we won't be able to get these approved by the system office given our mission and competition for such programs in the state. Thanks,

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Greensboro, NC 27412

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**Sent:** Tuesday, June 6, 2023 11:24 AM  
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**Cc:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** UNCG/rpk Project Leaders Meeting - Agenda for 6/8

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Mike Daly

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Michael Daly | Senior Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
mdaly@rpkgroup.com | Cell: 518-796-2209



**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Project Update  
**Date:** Friday, June 9, 2023 10:55:03 AM  
**Attachments:** [Outlook-dhgufbeg.png](#)  
[UNCG Weekly Project Update 2023.06.08.pdf](#)

---

H and Bob,

Attached is the weekly project update for your reference and review. As always, please let me know if you have any questions.

Have a great weekend!

Thanks again,  
Mike Daly

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Michael Daly | Senior Associate | [rpk GROUP](#)

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mdaly@rpkgroup.com | Cell: 518-796-2209

UNCG



# UNCG & rpk GROUP

## Status Report: June 9, 2023

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# Project Overview: June 5 – June 9

Overall Status	Project Status Overview & Key Items for Attention	
At Risk	UNCG IR validated shared data related to academic programs on 6/6. rpk is reviewing that data for inclusion into dashboards. Anticipated completion date is 6/9.	
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>Shared Labor and Market Competition analysis (6/6).</li> <li>Facilitated introduction to Academic Data Dashboard with Deans (6/7).</li> <li>Shared updated direct net revenue analysis with project leaders (6/8).</li> <li>Coordinated with _____ and _____ to shift Department Chair introduction to and training with dashboards to 8/1. Trainings for Deans will still occur over the summer.</li> </ul>	<ul style="list-style-type: none"> <li>Finalizing re-shared unit level record academic program data into dashboards.</li> <li>Meeting with _____ to structure dashboard training for Deans during summer.</li> <li>Sharing presentation and supporting data files for direct net revenue analysis with project leaders.</li> <li>Sharing dashboards for review by UNCG IR.</li> <li>UNCG/rpk Data Team meeting (6/15).</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>Re-shared academic program enrollment and retention data to adjust for UNCG IR noted inconsistencies.</li> </ul>	<ul style="list-style-type: none"> <li>Reviewing dashboards as shared by rpk.</li> <li>Reviewing presentation and supporting data file for direct net revenue analysis.</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	On Track	On Track	On Track														
Dashboard Development															On Track	On Track	On Track	On Track	On Track	On Track	On Track	Off Track	At Risk								
Dashboards Shared with Deans																						Off Track	Off Track	On Track							
Dashboards Shared with Chairs																							Off Track	Off Track	On Track						
Dashboards Shared with Taskforce																								Off Track	At Risk	On Track					
Faculty Workshops										Complete	Complete	On Track	On Track	On Track	On Track	On Track	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	On Track	On Track	On Track	On Track	On Track		

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May				June				July					
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk														
Final Report & Recommendations																				Complete	Complete	Complete	At Risk	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track

*rpk GROUP reached out to Jeanne on 6/7 to begin analyses to support the final report, but as of 6/9 have not heard back. Assuming she responds and data can be received quickly, the project can be complete by the end of July.*

Key	Complete	On Track	At Risk	Off Track	Not Started
	Complete	On Track	At Risk	Off Track	Not Started



# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
UNCG/rpk Data Team meeting	Data Team member	6/15, 10:00am	
Project Leaders meeting	 Bob, Katie and Mike	6/26, 9:00am	



# Revised Timeline – Academic Data/Dashboards

Data	All Data Collected	Definitions and Methodology Confirmed	Data Validated	Beta Dashboard Launch and Feedback Period	Beta Dashboard Refined Based on Feedback
Academic Program List	3/24	4/18	4/27	6/12 – 6/30	7/3-7
Academic Structure	4/7	4/21	N/A		
Course Data	3/24	4/13	4/21		
Instructor Data	3/31	5/4	5/5		
Faculty Data	4/14	5/4	5/5		
Academic Program Data*	4/14	4/28	6/6		
Finance Data	3/24	5/19	5/26	N/A	N/A

\* Given the complexities of the metrics for academic programs being presented in the dashboards, a decision by rpk/UNCG IR has been made to spend an additional week reviewing data.

Key	Complete	On Track	At Risk	Off Track	Not Started

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Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**From:**  
**To:** [Katie Hagan](#)  
**Cc:** [Bob Shea](#);  
**Subject:** Re: rpk Analysis Support Next Steps  
**Date:** Friday, June 9, 2023 10:42:03 PM

---

Hi, Katie,

This does align with what I had in mind. In addition to our administrative support positions, I think we have some opportunities in communications, advising, and student success services.

I will be on vacation next week but we can schedule time the week I return to discuss.

\_\_\_\_\_ is our \_\_\_\_\_. I've included him on this email and if you already have some idea on the data you will need in a report, please contact him directly and he should be able to help you while I am out.

I've also copied \_\_\_\_\_ on this email as she can arrange some time for us to meet when I return.

Thanks,

UNC Greensboro

---

**From:** Katie Hagan <khagan@rpkgroup.com>  
**Sent:** Wednesday, June 7, 2023 9:59 AM  
**To:**  
**Cc:** Bob Shea  
**Subject:** rpk Analysis Support Next Steps

Hi \_\_\_\_\_,

I hope all is well! I just met with Bob to discuss how rpk can use the remainder of our time with UNCG to support some additional analyses that are complimentary to the task force report. You and I talked about this a couple of weeks ago as well. I think the best opportunities are:

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Let me know your thoughts, and if this aligns with what you had in mind, we can set up some time to iron out the data request.

Thanks,  
Katie

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khagan@rpkgroup.com | 757-589-0490

**From:** [Katie Hagan](#)  
**To:**  
**Cc:** [Bob Shea](#);  
**Subject:** Re: rpk Analysis Support Next Steps  
**Date:** Monday, June 12, 2023 3:26:06 PM

---

Thanks so much, Have a great vacation and I look forward to connecting when you return.

I'll send you a separate email.

Best,  
Katie

---

**From:**  
**Sent:** Friday, June 9, 2023 10:41 PM  
**To:** Katie Hagan <khagan@rpkgroup.com>  
**Cc:** Bob Shea

**Subject:** Re: rpk Analysis Support Next Steps

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Thanks,

UNC Greensboro



---

**From:** Katie Hagan <khagan@rpkgroup.com>

**Sent:** Wednesday, June 7, 2023 9:59 AM

**To:**

**Cc:** Bob Shea

**Subject:** rpk Analysis Support Next Steps

Hi

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**From:** [Katie Hagan](#)  
**To:** ; [Bob Shea](#);  
**Cc:** [Mike Daly](#); [Raven Moody](#)  
**Subject:** Financial analysis files  
**Date:** Thursday, June 15, 2023 7:32:11 PM  
**Attachments:** [UNCG Direct Net Revenue Analysis June 12 2023.xlsx](#)  
[UNCG Direct Net Revenue 2023.06.15.23.pdf](#)

---

Hi , Bob and

I hope everyone is having a good week. I apologize for the delay in getting this to you -- it's been one of those weeks. Attached is the deck we discussed last week, revised a bit based on your great feedback to improve labeling. Also attached is the analysis file. Take as much time as you need to review and let us know when you're ready to reengage to decide on next steps for sharing this beyond this group.

Best,  
Katie

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khagan@rpkgroup.com | 757-589-0490



# UNC Greensboro

DRAFT: Direct Net Revenue Analysis

June 15, 2023

# Goals for Direct Net Revenue Analysis

- Transparency
  - Academic department revenues and expenses
  - High-level data across departments and schools over time
- Build shared understanding of:
  - Past resource usage and distribution
  - Levers under our control (both resource and cost drivers)
- Begin shared pursuit of good stewardship amid shifting financial landscape

# Connection to Academic Portfolio Review

Below is what the Task Force assembled by \_\_\_\_\_ to make recommendations about academic programs and departments is being asked to consider as it relates to financial & finance-adjacent (faculty, staff) data – bold items are of particular relevance for this analysis:

*Cost and Revenue of Delivery (estimated based on the factors below; all course, personnel, and finance data are tracked in institutional data systems at the department/school level—efforts to capture faculty effort and related costs and revenues at the program level would have to be done manually)*

- 1. Faculty FTE (total full-time and part-time faculty FTE) and faculty headcount by department/school*
- 2. SHRA and EHRA Non-faculty Staff FTE (total full-time and part-time staff FTE) and staff headcount by department/school*
- 3. Personnel spending for all faculty, staff, and graduate teaching/research assistants at the department/school level*
- 4. Non-personnel spending for the department/school*
- 5. Revenue for the department (tuition, differential tuition, fees, state appropriation)**
- 6. Credit hour production by full-time and part-time faculty at the department/school level*
- 7. Cost per credit hour by department/school**

# Developing the Direct Net Revenue Analysis Methodology

- Determine the ‘pot of money’
  - Which revenues and expenses should be included/excluded in the analysis?
- Determine what will be ‘direct’
  - Which revenues and expenses are specifically related to an academic department?
- Determine allocation methodologies
  - How will the dollars be distributed to the appropriate academic departments?

# What's Included & What's Not?

- Finance Data Source: ODS Data Warehouse, Cash Basis
- Years: FY2020, FY2021 & FY2022
- Included:
  - Unrestricted revenues and expenses directly assigned to academic departments are included.
  - Tuition & fees, scholarships/waivers, and state appropriation, although not directly assigned to academic departments in the general ledger, are included and are allocated based on appropriate methodology.
- Excluded:
  - Restricted, Auxiliary, Loan, Endowment, Agency, and Plant funds.
  - Unrestricted fund activity, such as academic administration and institutional administration, not directly assigned to academic departments.



# Expense Methodology

- All unrestricted fund expenses with a finance org identified as an academic department are included. Expenses in other academic orgs are excluded.
- **Exceptions:**
  - **Included:** Fund 112073-DNP Prog Tuition Differential is assigned to org 12801-Dean's Office – NU, which is not an academic department. After discussion with dean, it was determined this should be included as a Nursing academic department expense, not a dean expense.
  - **Included:** Expenses for the Joint School of Nanosci/Nanoeng includes org 13201-Dean's Office – NN and 13202-Nanoscience. Unlike other schools, faculty are assigned to the dean's office org as their home department in HR data as well as charged there in finance data. 13202-Nanoscience contains mostly operational expenses.
  - **Excluded:** Differential tuition expense funds within the Bryan School. Per discussion with the dean, they centralize most of those expenses and are not directly related to the instruction of their programs. Thus, these are not included in the analysis.

# Revenue Methodology: Net Tuition & Fees

- Direct net tuition & fee revenues (includes scholarships and waivers) not assigned to an academic department org will be distributed based on one of the following attributes:
  - **All** – Allocated to all academic departments based on portion of total student credit hours produced.
  - **Level** – Allocated to academic departments based on portion of undergraduate or graduate student credit hours produced.
  - **Dept-Level** – Differential tuition and related expenses are assigned to the corresponding department at the graduate level.
- **Exceptions:**
  - Differential tuition revenue funds are not assigned to academic department finance orgs. These are mapped directly to the appropriate academic department org except for those assigned to the Bryan School. Per discussion with Bryan School dean, they centralize most of those expenses and are not directly related to the instruction of their programs. Thus, these are not included in the analysis. (See prior slide)

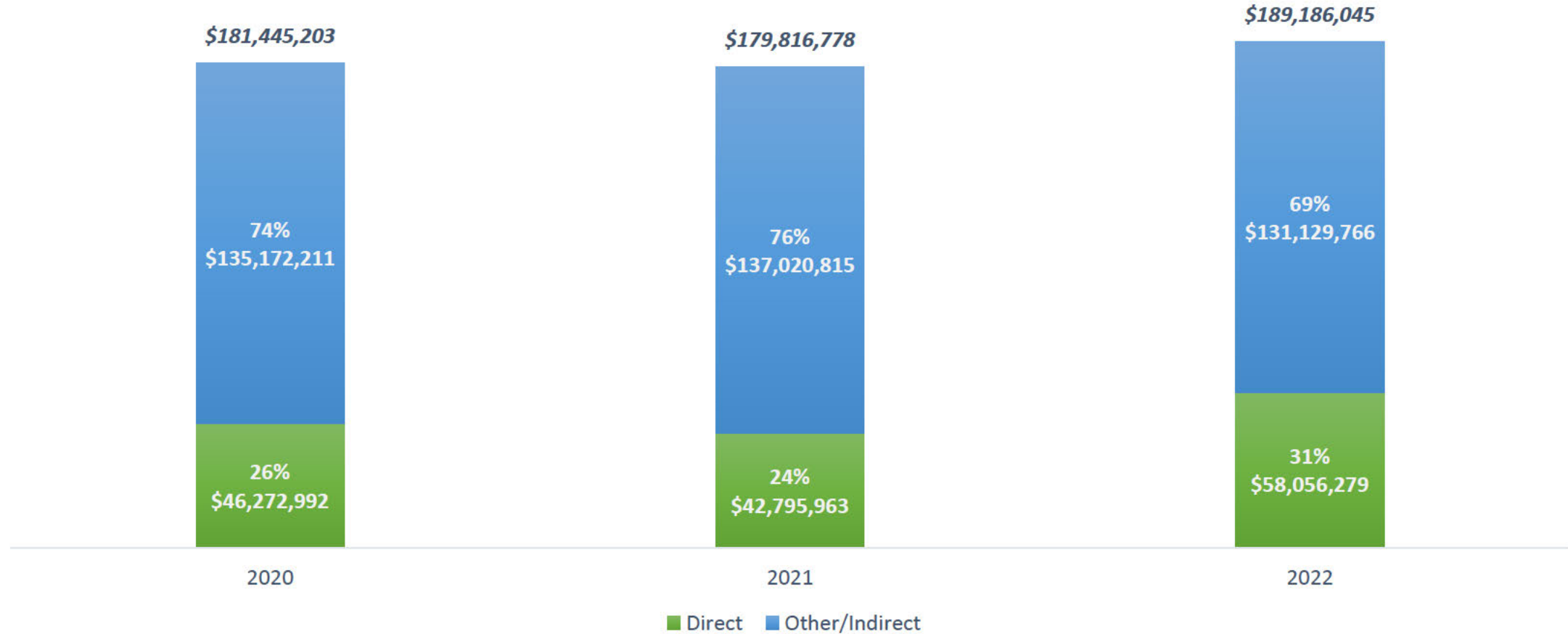
# Bryan School Excluded Differential Revenue & Expenses

PROGRAM	FUND	FUND_DESC	ORGANIZATION_CODE	ORGANIZATION_DESC	PROGRAM_DESC	FISCAL_YEAR		
						2020	2021	2022
<b>REVENUE</b>	119503	MBA Tuition Differential	99511	Institutional - Bryan School	Multiactivity	441,420.48	492,090.48	658,447.08
	119504	MSITM Tuition Differential	99511	Institutional - Bryan School	Multiactivity	480,480.32	496,774.00	450,350.00
	119505	MSA Tuition Differential	99511	Institutional - Bryan School	Multiactivity	146,120.96	206,658.00	285,620.00
	119507	CARS Tuition Differential	99511	Institutional - Bryan School	Multiactivity	36,720.00	36,900.00	31,917.60
	119508	Economics Tuition Differential	99511	Institutional - Bryan School	Multiactivity	11,041.20	15,174.60	23,863.20
	119518	MSIB Tuition Differential	99511	Institutional - Bryan School	Multiactivity	31,127.28	45,192.00	74,100.00
	119522	PhD BADM Tuition Differential	99511	Institutional - Bryan School	Multiactivity	51,372.00	74,916.00	83,636.00
<b>REVENUE Total</b>						<b>1,198,282.24</b>	<b>1,367,705.08</b>	<b>1,607,933.88</b>
<b>EXPENSES</b>	116017	B and E Deans Office TD	11801	Dean's Office - BE	Student Services	(647,268.50)	(689,507.67)	(680,137.08)
	116042	CARS TD	12404	Consumer Apparel-Retail Stds	Student Services	(36,453.39)	(33,562.61)	(22,025.48)
	116043	ECON TD	11802	Economics	Student Services	(11,040.20)	(5,244.52)	(4,055.00)
	116047	MBA TD	11808	MBA Office	Student Services	(70,849.46)	(7,770.78)	(93,756.53)
	116048	MSA TD	11812	Accounting and Finance	Student Services	(79,153.05)	(83,350.16)	(163,103.25)
	116049	MSITM TD	11806	Info Sys and Supply Chn Mngmt	Student Services	(107,418.14)	(99,573.48)	(125,854.85)
	116050	GCS TD	11814	Graduate Recruitment Office	Student Services	(4,922.24)	(899.78)	(4,702.89)
	116051	GRO TD	11814	Graduate Recruitment Office	Student Services	(14,973.32)	(35,349.06)	(38,736.26)
	116062	PhD BADM TD	11801	Dean's Office - BE	Student Services	(42,993.52)	(85,616.65)	(49,558.72)
<b>EXPENSES Total</b>						<b>(1,015,071.82)</b>	<b>(1,040,874.71)</b>	<b>(1,181,930.06)</b>
<b>Grand Total</b>						<b>183,210.42</b>	<b>326,830.37</b>	<b>426,003.82</b>

# Revenue Methodology: State Appropriation

- State appropriation is allocated to academic departments using the current funding model logic (amounts allocated to units proportional to the funding per credit hour/academic discipline per the FY23 UNC System formula).
- Methodology for determining state revenue amounts for the model:
  - Ensure that the portion of revenue received by academic units in total matches the portion of total expense they incur. For the years of analysis, the direct department expense ranges from 37-38% of UNCG total unrestricted expenses, so the tuition & fees + state revenues should equal 37-38% of UNCG total revenue.

# State Allocation % Distribution in Model

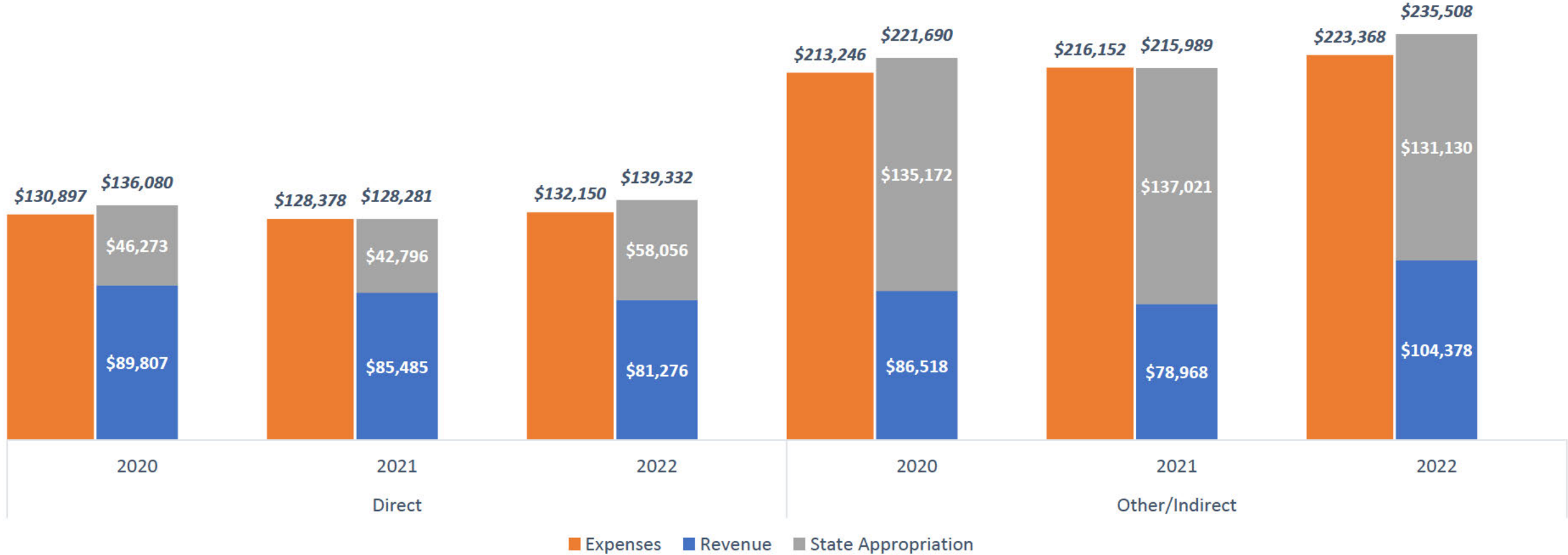


Direct: units with a finance org identified as an academic department

Other/Indirect: units with a finance org not identified as an academic department



# Revenues & Expenses: UNCG had a surplus in 2020 & 2022

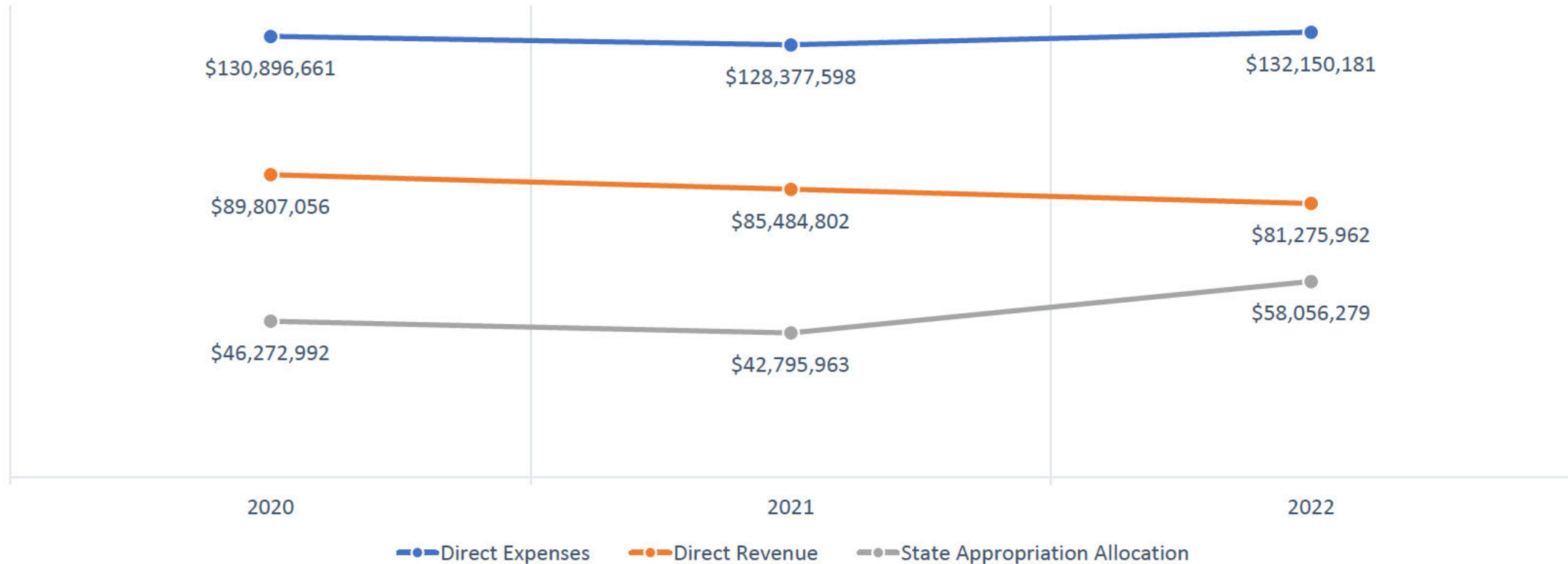


Direct Revenue: Tuition and fees (includes scholarships and waivers) that are associated with an academic department  
 State Appropriation: allocated to academic departments using the current funding model logic (amounts allocated to units proportional to the funding per credit hour/academic discipline per the FY23 UNC System formula)  
 Other/Indirect Revenue: Institutional fees (student activity, ed & tech, facility, etc.), noncapital gifts, and other unrestricted revenues not associated with an academic unit  
 Other/Indirect Expenses: All unrestricted fund expenses not associated with a finance org identified as an academic unit



# Since Direct Revenues (Tuition & Fees) Decreased 9% but Expenses Were Flat in 2022, More of the State Approp. was Allocated to Direct

## Direct Revenue and Direct Expenses



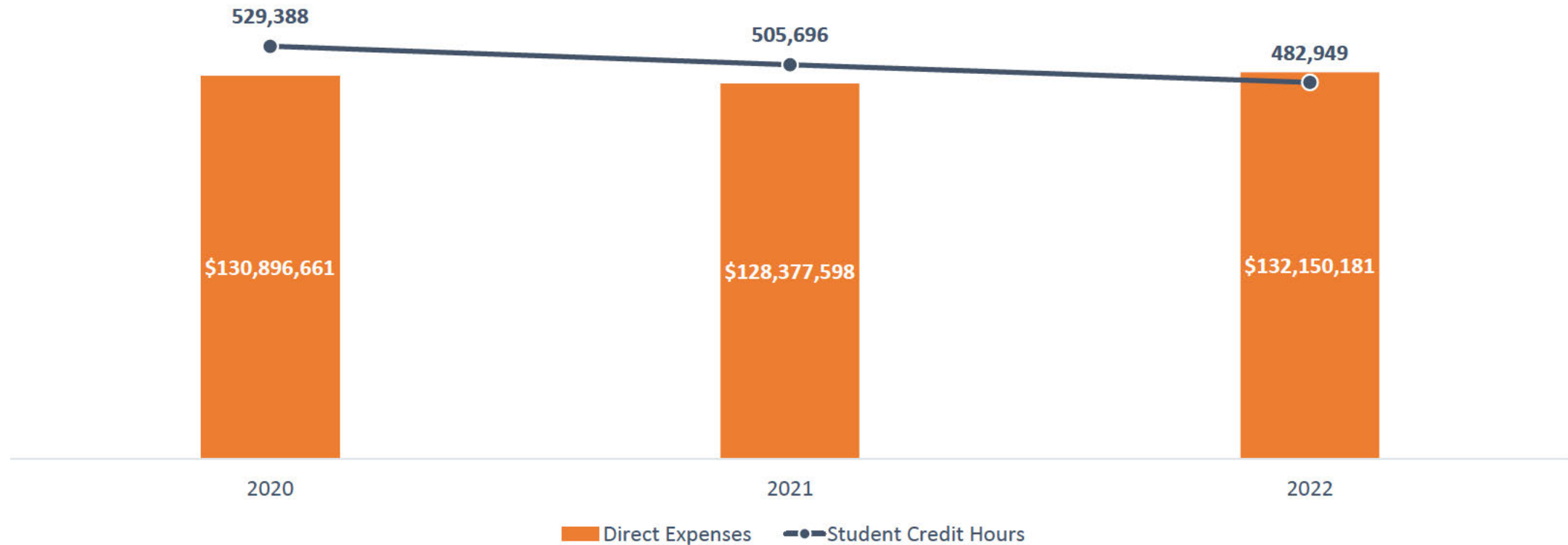
Direct Revenue = Tuition and Fee Revenue (including scholarships and waivers)

Direct Expenses: All unrestricted fund expenses with a finance org identified as an academic department

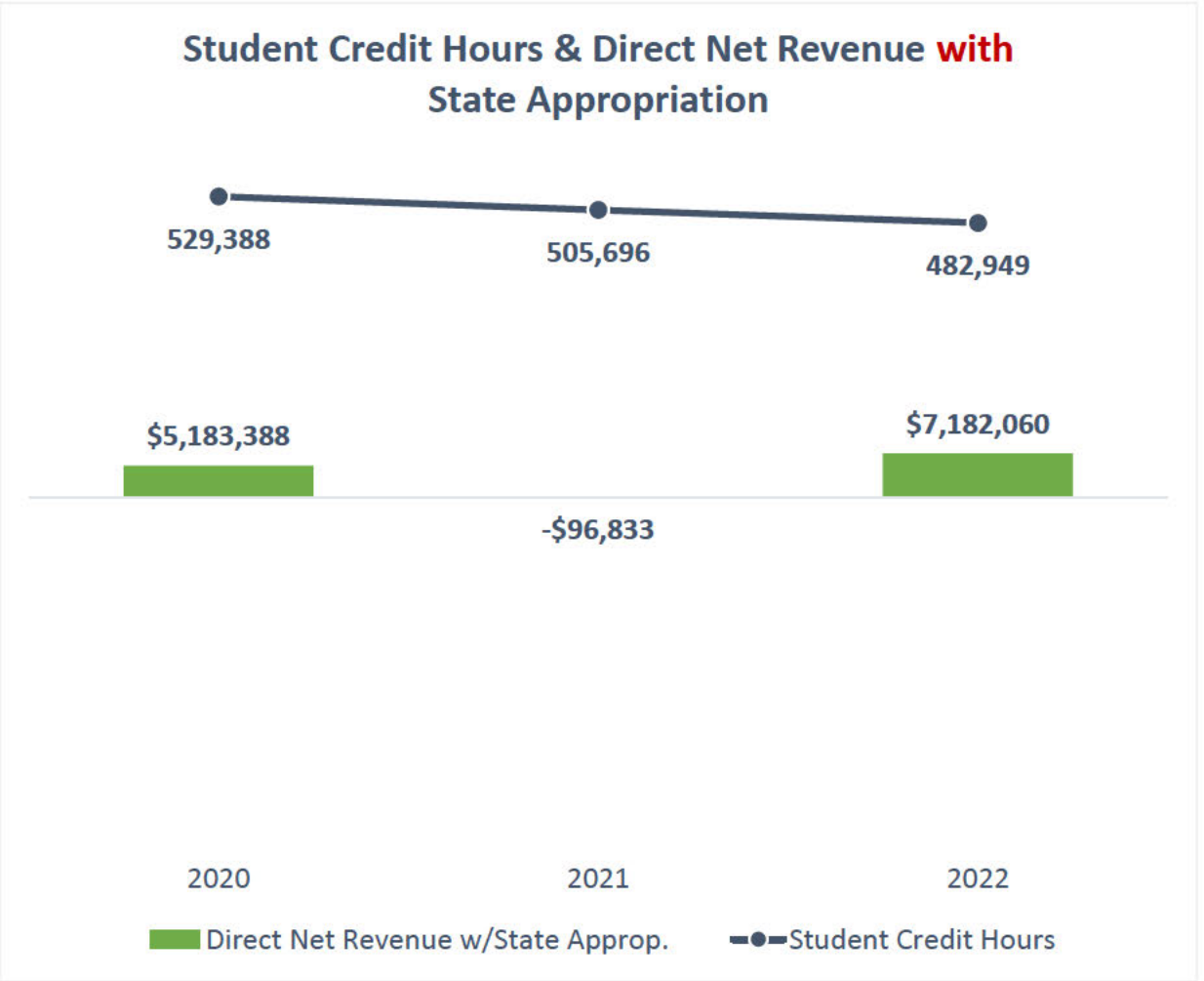
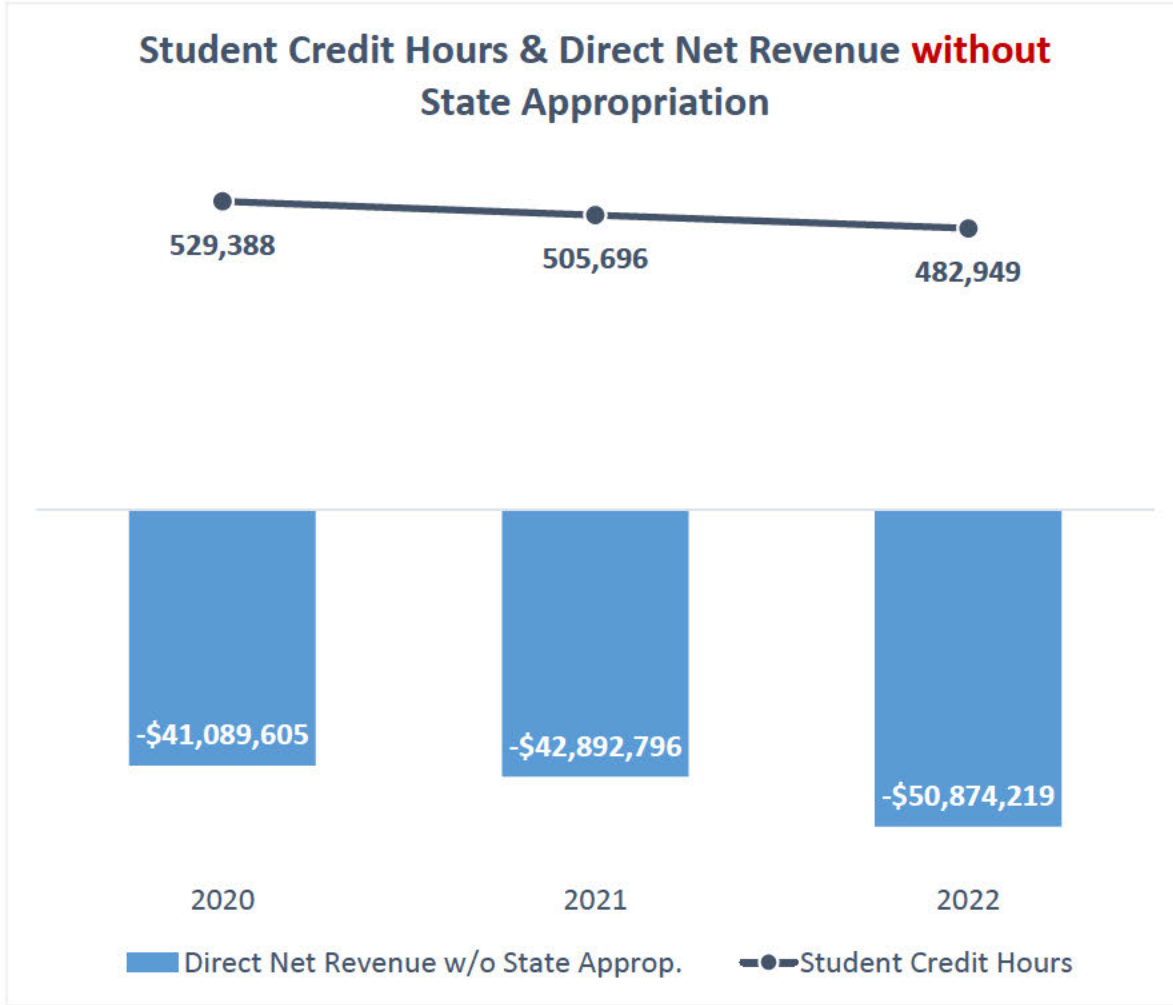
State Appropriation: allocated to academic departments using the current funding model logic (amounts allocated to units proportional to the funding per credit hour/academic discipline per the FY23 UNC System formula).

# SCH Decreased 9% from 2020 to 2022; Direct Expenses Flat

## Student Credit Hours and Direct Expenses

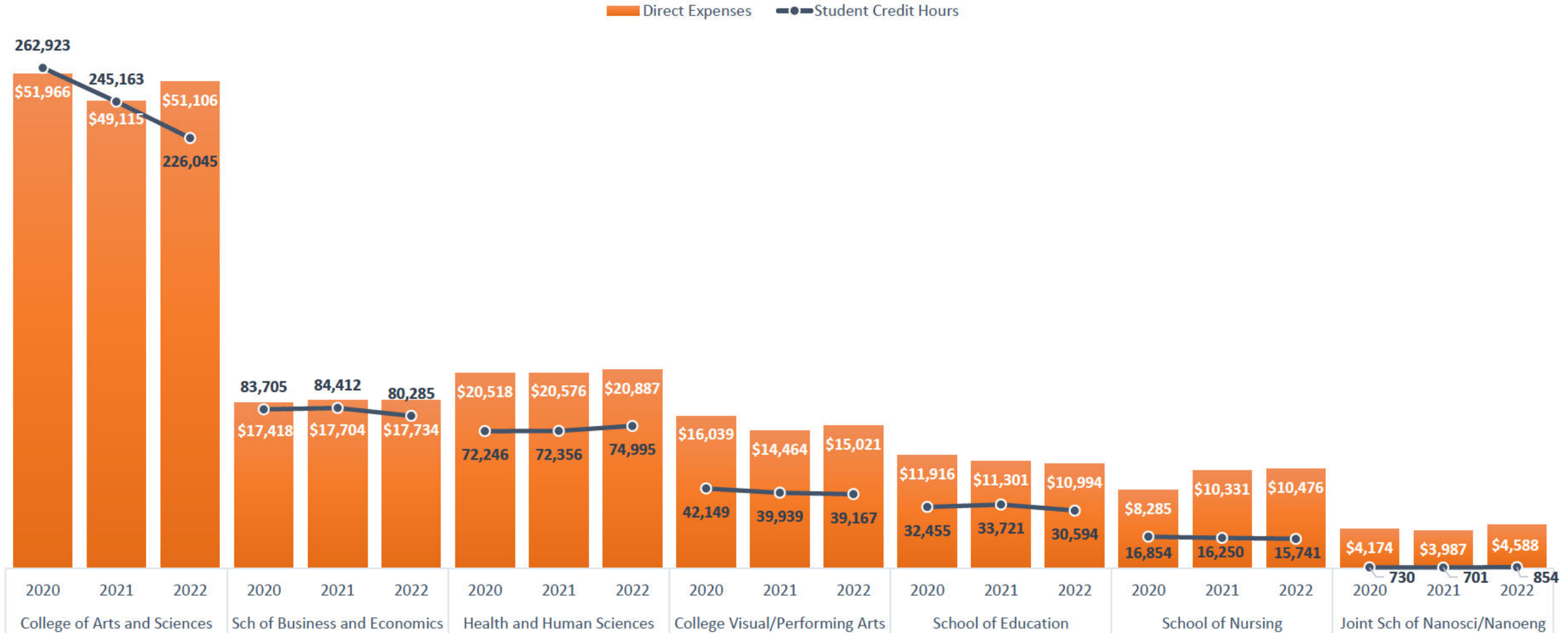


Direct Expenses: All unrestricted fund expenses with a finance org identified as an academic department



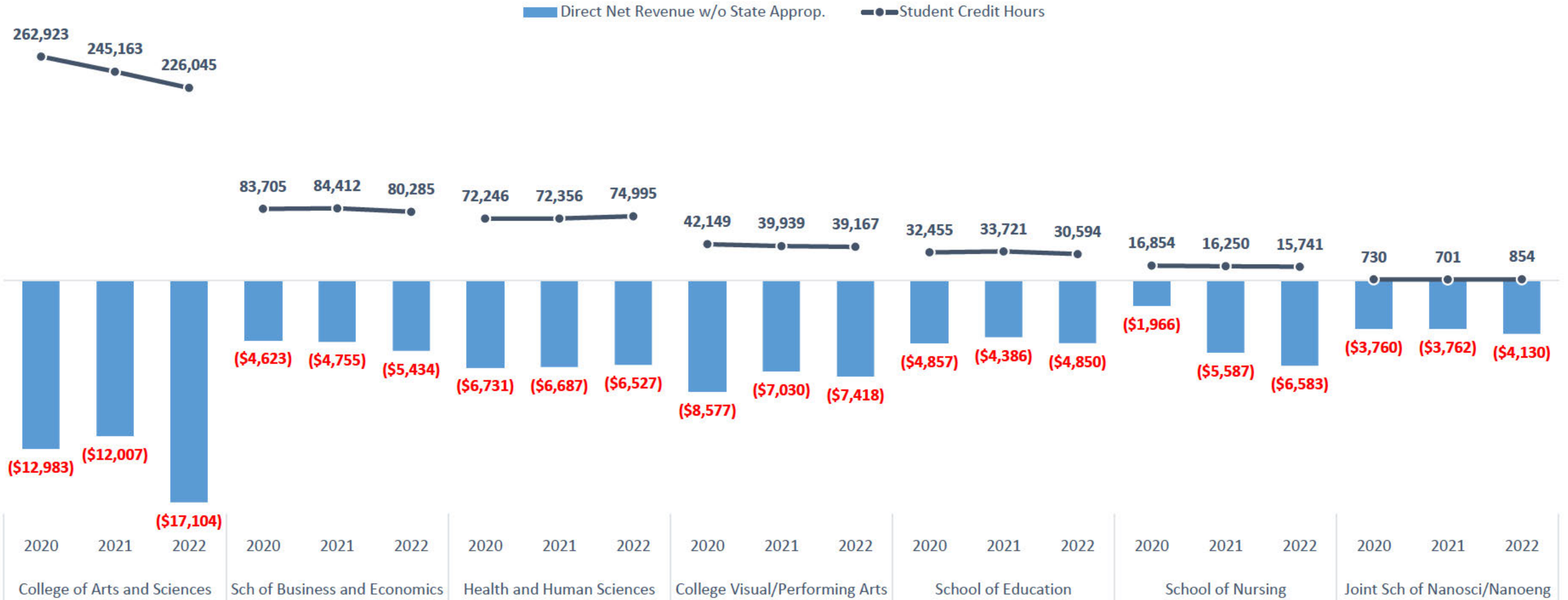
Direct Revenue = Tuition and Fee Revenue (including scholarships and waivers)

## Student Credit Hours & Direct Expenses (in thousands)



Direct Expenses: All unrestricted fund expenses with a finance org identified as an academic department  
 Schools not shown in chart: Interdisciplinary & UNC Exchange

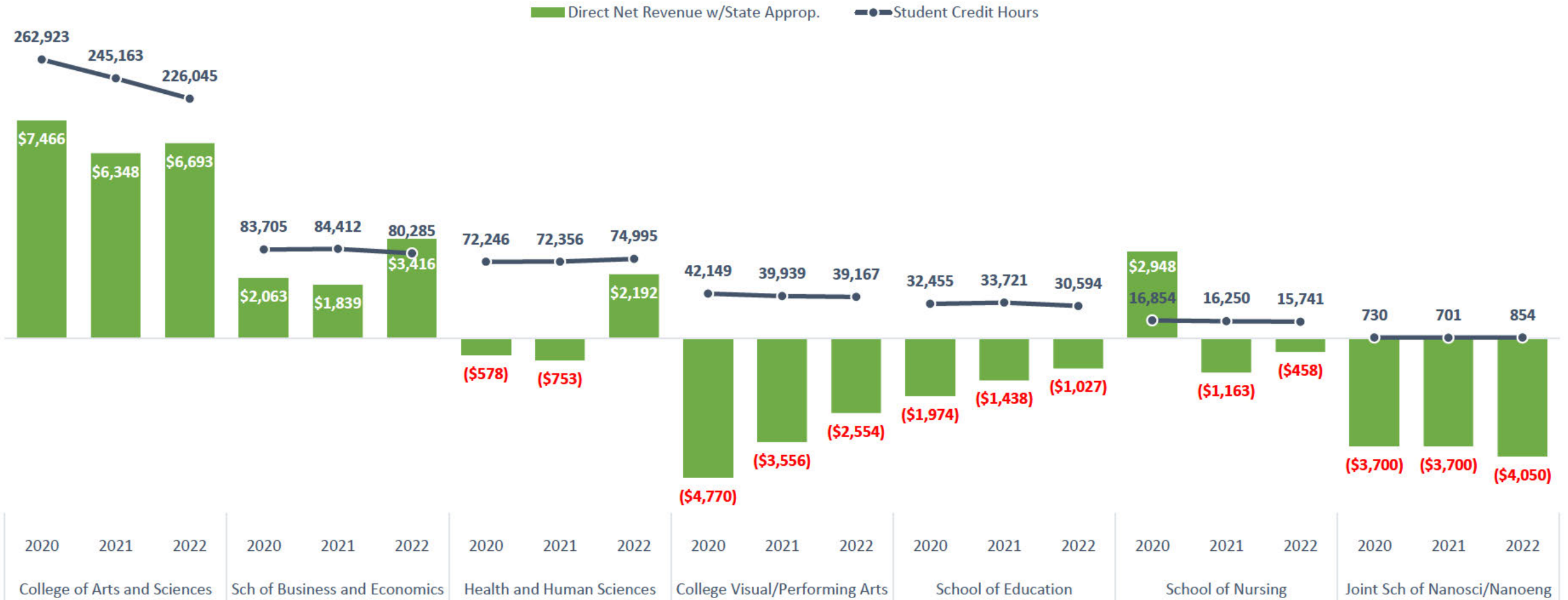
## Student Credit Hours and Direct Net Revenue **without** State Appropriation (in thousands)



Schools not shown in chart: Interdisciplinary & UNC Exchange



## Student Credit Hours and Direct Net Revenue **with** State Appropriation (in thousands)



Schools not shown in chart: Interdisciplinary & UNC Exchange



# Department Examples

RELIGIOUS STUDIES	2020	2021	2022	Change from 2020	
				#	%
Program(s)	UG - 1	UG - 1	UG - 1		
Majors	40	31	31	(9)	-23%
Student Credit Hours	6,855	5,745	4,203	(2,652)	-39%
Faculty FTE	9.6	11.5	10.1	0.5	5%
SCH per Faculty FTE	733	513	433	(300)	-41%
Total Direct Expenses	\$1,222,639	\$1,059,382	\$1,202,645	(19,994)	-2%
Total Direct Expenses per SCH	\$178	\$184	\$286	108	60%
Direct Net Revenue without State Appropriation	(\$259,099)	(\$231,090)	(\$605,239)	(346,140)	-134%
Direct Net Revenue with State Appropriation	\$223,320	\$157,569	(\$209,108)	(432,428)	-194%

PHYSICS	2020	2021	2022	Change from 2020	
				#	%
Program(s)	UG - 2	UG - 2	UG - 2		
Majors	73	56	49	(24)	-33%
Student Credit Hours	4,516	4,563	4,365	(151)	-3%
Faculty FTE	9	8	8	(1.0)	-11%
SCH per Faculty FTE	506	570	546	40	8%
Total Direct Expenses	\$1,119,058	\$897,238	\$970,059	(148,999)	-13%
Total Direct Expenses per SCH	\$248	\$197	\$222	(26)	-10%
Direct Net Revenue without State Appropriation	(\$465,804)	(\$225,799)	(\$353,950)	111,854	24%
Direct Net Revenue with State Appropriation	(\$49,747)	\$169,599	\$198,287	248,035	499%

# Thank you

Katie Hagan, Principal  
Mike Daly, Sr. Associate  
Raven Moody, Sr. Analyst

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk weekly project update  
**Date:** Friday, June 16, 2023 9:30:53 AM  
**Attachments:** [Outlook-wakiofr.png](#)  
[UNCG Weekly Project Update 2023.06.16.pdf](#)

---

Hi and Bob,

Attached is the weekly project update for your awareness. We'll be sharing the final version of the dashboard with UNCG IR on Monday so they can facilitate hosting and providing appropriate access to stakeholders. I'd like to focus our scheduled time on 6/26 to review the dashboards.

Have a great weekend!

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209



UNCG



# UNCG & rpk GROUP

## Status Report: June 16, 2023

rpk GROUP  
from mission to market

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# Project Overview: June 12 – June 16

Overall Status	Project Status Overview & Key Items for Attention	
On Track	<ul style="list-style-type: none"> <li>Awaiting confirmation of workshops structure for stakeholders</li> </ul>	
Owner(s)	Accomplishments	Upcoming Activities
rpK GROUP	<ul style="list-style-type: none"> <li>Shared dashboards for review by UNCG IR.</li> <li>Scheduled meeting with [redacted] to coordinate dashboard training for Deans.</li> <li>Shared presentation and data file for direct net revenue analysis.</li> <li>Met with [redacted] to facilitate HR data sharing for ASR.</li> </ul>	<ul style="list-style-type: none"> <li>Re-calibrating dashboard layout and metrics based on feedback from UNCG IR</li> <li>Scheduling and facilitating final Data Team meeting.</li> <li>Meeting with [redacted] to discuss HR analyses for ASR.</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>Reviewed dashboards and provided feedback on layout and metrics.</li> <li>Shared final academic program data for incorporation into dashboards.</li> </ul>	<ul style="list-style-type: none"> <li>Initiating hosting and enabling access to dashboards for stakeholder groups.</li> <li>Reviewing presentation and supporting data file for direct net revenue analysis.</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	On Track	On Track	On Track														
Dashboard Development																On Track	On Track	On Track	On Track	On Track	On Track	On Track	At Risk	On Track							
Dashboards Shared with Deans																						Off Track	Off Track	On Track							
Dashboards Shared with Chairs																							Off Track	Off Track	On Track						
Dashboards Shared with Taskforce																								Off Track	At Risk	On Track					
Faculty Workshops										Complete	Complete	On Track	On Track	On Track	On Track	On Track	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	On Track	On Track	On Track	On Track	On Track		

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May				June				July					
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk														
Final Report & Recommendations																				Complete	Complete	Complete	At Risk	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track

Katie is working with \_\_\_\_\_ & team to conduct necessary data analyses to complete the ASR report.

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Deans Training meeting	Mike, [REDACTED]	6/19, 4:00pm	
HR Data	Katie Hagan and [REDACTED]	6/21, 11:00am	
Project Leaders meeting	[REDACTED] Bob, Katie and Mike	6/26, 9:00am	

# Revised Timeline – Academic Data/Dashboards

Data	All Data Collected	Definitions and Methodology Confirmed	Data Validated	Beta Dashboard Launch and Feedback Period	Beta Dashboard Refined Based on Feedback
Academic Program List	3/24	4/18	4/27	6/12 – 6/30	7/3-7
Academic Structure	4/7	4/21	N/A		
Course Data	3/24	4/13	4/21		
Instructor Data	3/31	5/4	5/5		
Faculty Data	4/14	5/4	5/5		
Academic Program Data*	4/14	4/28	6/6		
Finance Data	3/24	5/19	5/26	N/A	N/A

\* Given the complexities of the metrics for academic programs being presented in the dashboards, a decision by rpk/UNCG IR has been made to spend an additional week reviewing data.

Key	Complete	On Track	At Risk	Off Track	Not Started

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Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#)  
**Subject:** Re: Slide Deck  
**Date:** Friday, June 16, 2023 9:40:57 AM

---

Hi Bob,

Mike just sent the weekly update and I sent the financial analysis yesterday - was there something else you had in mind?

Best,  
Katie

---

**From:** Bob Shea  
**Sent:** Thursday, June 15, 2023 10:24 PM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Subject:** Slide Deck

Did you send? Thanks

Get [Outlook for iOS](#)

**From:**  
**To:** [Mike Daly](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk weekly project update  
**Date:** Monday, June 19, 2023 8:31:47 AM  
**Attachments:** [Outlook-wakiofr.png](#)

---

Thanks Mike and Katie,  
Looking forward to our next meeting to discuss how things are going overall.

University of North Carolina Greensboro  
Greensboro, NC 27412

---

**From:** Mike Daly <mdaly@rpkgroup.com>  
**Sent:** Friday, June 16, 2023 9:30 AM  
**To:** Bob Shea  
**Cc:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** UNCG/rpk weekly project update

Hi            and Bob,

Attached is the weekly project update for your awareness. We'll be sharing the final version of the dashboard with UNCG IR on Monday so they can facilitate hosting and providing appropriate access to stakeholders. I'd like to focus our scheduled time on 6/26 to review the dashboards.

Have a great weekend!

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209



**From:** [Rick Staisloff](#)  
**To:** [Bob Shea](#)  
**Cc:** [Laura Reames](#);  
**Subject:** UNGC - Progress Invoice 23-0063 - May - RPK GROUP  
**Date:** Monday, June 19, 2023 6:56:40 PM  
**Attachments:** [image001.png](#)  
[UNCG - rpk GROUP - Progress Invoice 23-0063 - May 2023.pdf](#)

---

Bob,

Attached please find our progress invoice for May.

Let me know if you have any questions, or require additional information to process this.

Regards,

Rick

**rpk** GROUP  
from mission to market

Richard Staisloff | Senior Partner | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

# rpk GROUP

626C Admiral Drive, Suite 511  
Annapolis, MD 21401, United States  
Tel: 410-591-9018  
rstaisloff@rpkgroup.com  
www.rpkgroup.com



## INVOICE

Robert Shea  
University of North Carolina-Greensboro  
1400 Spring Garden Ct  
Greensboro, NC 27412

TAX ID:  
INVOICE DATE: 6/18/2023  
INVOICE NO: 23-0063  
BILLING THROUGH: 5/31/2023

PROFESSIONAL SERVICES	HOURS	RATE	AMOUNT
Associate	366.25	\$350.000	\$128,187.50
Principal	20.75	\$450.000	\$9,337.50
Senior Partner	4.50	\$450.000	\$2,025.00
<b>TOTAL SERVICES</b>	<b>391.50</b>		<b>\$139,550.00</b>
		<b>SUBTOTAL</b>	<b>\$139,550.00</b>
		<b>AMOUNT DUE THIS INVOICE</b>	<b>\$139,550.00</b>

This invoice is due on 7/18/2023

Richard Staisloff, Senior Partner  
rstaisloff@rpkgroup.com

Laura Reames, Billing Contact  
lreames@rpkgroup.com

Remit payment to:  
rpk GROUP  
626C Admiral Drive, Suite 511  
Annapolis, MD 21401

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk GROUP Weekly Project Update  
**Date:** Friday, June 23, 2023 8:31:24 AM  
**Attachments:** [Outlook-lqfvvcvx.png](#)  
[UNCG Weekly Project Update 2023.06.23.pdf](#)

---

Hi and Bob,

Attached is the weekly project update for your review. The agenda for our scheduled meeting on Monday, please feel free to bring additional items forward.

- Academic Data Dashboard walk-through
- ASR update
- Net revenue update

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
mdaly@rpkgroup.com | Cell: 518-796-2209

UNCG



# UNCG & rpk GROUP

## Status Report: June 23, 2023

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# Project Overview: June 19 – June 23

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpK GROUP	<ul style="list-style-type: none"> <li>Final Academic Data dashboard and supporting data files shared with UNCG IR (6/19).</li> <li>Mike met with _____ to coordinate July dashboard training with Academic Deans (6/19).</li> <li>Katie met with _____ to review HR data (6/21).</li> </ul>	<ul style="list-style-type: none"> <li>Scheduling and facilitating final Data Team meeting.</li> <li>Sharing Academic Data dashboard with project leaders (6/26).</li> <li>Conducting HR analyses to support ASR work.</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>Met with rpK to coordinate July dashboard training for Academic Deans (6/19).</li> <li>Met with rpK to review HR data (6/21).</li> </ul>	<ul style="list-style-type: none"> <li>Initiating hosting and enabling access to dashboards for stakeholder groups.</li> <li>Reviewing presentation and supporting data file for direct net revenue analysis.</li> <li>Reviewing Academic Data dashboard.</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July					
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31	
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																										
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	On Track	On Track	On Track															
Dashboard Development															On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	At Risk	Complete	Complete							
Dashboards Shared with Deans																						Off Track	Off Track	Off Track	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started
Dashboards Shared with Chairs																						Off Track	Off Track	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	
Dashboards Shared with Taskforce																							Off Track	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	
Faculty Workshops										Complete	Complete	On Track	On Track	On Track	On Track	On Track	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	On Track	On Track	Not Started	Not Started	Not Started			

UNCG IR is coordinating hosting and sharing of Academic Data dashboards. Deans will have a training week of 7/24 with rpk and UNCG IR. Chairs and Program Directors will have a training with UNCG IR in early August.

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May				June				July					
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk														
Final Report & Recommendations																		Complete	Complete	Complete	At Risk	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	

Katie is working with \_\_\_\_\_ & team to conduct necessary data analyses to complete the ASR report.

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Leaders meeting	[REDACTED] Bob, Katie and Mike	6/26, 9:00am	
UNCG/rpk Data Team meeting	Data Team members	TBD	Coordinating with UNCG IR
Dashboard Training for Academic Deans	[REDACTED] and Mike Daly	7/26; TBD	Finalizing agenda and working exercises

# Revised Timeline – Academic Data/Dashboard

Data	All Data Collected	Definitions and Methodology Confirmed	Data Validated	Beta Dashboard Launch and Feedback Period	Beta Dashboard Refined Based on Feedback
Academic Program List	3/24	4/18	4/27	6/12 – 6/30	7/3-8/1
Academic Structure	4/7	4/21	N/A		
Course Data	3/24	4/13	4/21		
Instructor Data	3/31	5/4	5/5		
Faculty Data	4/14	5/4	5/5		
Academic Program Data*	4/14	4/28	6/6		
Finance Data	3/24	5/19	5/26	N/A	N/A

Key

Complete

On Track

At Risk

Off Track

Not Started

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Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**From:** [Mike Daly](#)  
**To:** [Katie Hagan](#); [Bob Shea](#)  
**Subject:** Re: UNCG/rpk Project Leaders Check-in  
**Date:** Wednesday, June 28, 2023 8:19:12 AM

---

Please use this link for our 830am and 9am meetings today - thanks!

<https://us02web.zoom.us/j/>

## Join our Cloud HD Video Meeting

Zoom is the leader in modern enterprise video communications, with an easy, reliable cloud platform for video and audio conferencing, chat, and webinars across mobile, desktop, and room systems. Zoom Rooms is the original software-based conference room solution used around the world in board, conference, huddle, and training rooms, as well as executive offices and classrooms. Founded in 2011, Zoom helps businesses and organizations bring their teams together in a frictionless environment to get more done. Zoom is a publicly traded company

[us02web.zoom.us](https://us02web.zoom.us)

rpk GROUP is inviting you to a scheduled Zoom meeting.

Topic: rpk/UNCG Project Leaders

Time: Jun 28, 2023 08:30 AM Eastern Time (US and Canada)

Join Zoom Meeting

Meeting ID:

---

One tap mobile

+16468769923,,83973145814# US (New York)

+16469313860,,83973145814# US

---

Dial by your location

- +1 646 876 9923 US (New York)
- +1 646 931 3860 US
- +1 309 205 3325 US
- +1 312 626 6799 US (Chicago)
- +1 301 715 8592 US (Washington DC)
- +1 305 224 1968 US
- +1 360 209 5623 US
- +1 386 347 5053 US

- +1 507 473 4847 US
- +1 564 217 2000 US
- +1 669 444 9171 US
- +1 669 900 6833 US (San Jose)
- +1 689 278 1000 US
- +1 719 359 4580 US
- +1 253 205 0468 US
- +1 253 215 8782 US (Tacoma)
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**From:** Mike Daly

**Sent:** Monday, June 26, 2023 10:27 AM

**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>;

Bob Shea

**Subject:** UCG/rpk Project Leaders Check-in

**When:** Wednesday, June 28, 2023 8:30 AM-8:55 AM.

**Where:** Microsoft Teams Meeting

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**From:** [Mike Daly](#)  
**To:**  
**Cc:** [Bob Shea](#); [Katie Hagan](#)  
**Subject:** UNCG/rpk Market Opportunity Analysis  
**Date:** Wednesday, June 28, 2023 2:09:45 PM  
**Attachments:** [Outlook-r041baee.png](#)  
[UNCG MDO Memo Final\\_062823.pdf](#)

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Hello

Attached please find the Market Demand & Opportunity Analysis that rpk GROUP prepared for UNCG. This copy is for public sharing, as you deem necessary.

Supporting data files will be shared with UNCG IR per project protocols.

Please let me know if you have any questions.

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

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## Market Demand & Opportunity Analysis University of North Carolina Greensboro (UNCG)

June 28, 2023

The Market Demand and Opportunity (MDO) analysis is designed to provide forward-looking insight into the alignment between UNCG's current academic portfolio (all certificate and degree offerings) and expected employment opportunities in North Carolina over the next decade. The MDO analysis incorporates three different approaches to assess the alignment between UNCG's programs and projected labor market demand:

- **Program analysis** examines the labor market demand and wages for occupations that map to existing UNCG programs.
- **Competitor analysis** examines the strength of similar program offerings at other four-year competitor institutions in North Carolina.
- **Gap analysis** identifies growing occupations for which UNCG does not currently offer programs, and the competitor landscape surrounding the programs to prepare students for these jobs.

### ***Key highlights from these analyses show:***

- Two-thirds, or 121, of UNCG's academic programs are preparing students for occupations with a strong or moderate employment outlook and above median wages.
- Only about 20% of UNCG programs (39) have a weak employment outlook, but three-quarters of those programs (28) still prepare students for occupations with higher-than-median wages.
- The School of Nursing and the School of Business and Economics are most likely to offer programs (100% and 76%, respectively) that position graduates to access occupations with strong employment and wage opportunities.
- Programs with the weakest employment outlook are concentrated in the School of Music Department and the Consumer Apparel-Retail Studies Department in the School of Business and Economics.
- Thirty percent of UNCG's current programs (65) have a strong market position, with few competitor institutions offering similar programs, accompanied by evidence of robust student demand among the institutions that do offer those programs. In the Schools of Business and Economics and Education, more than 40% of the programs demonstrate a strong market position.
- Consideration for potential investment in new UNCG programs should include engineering (Civil, Industrial, and Mechanical) and programs that prepare students to work as Substance Abuse, Behavioral Disorder, and Mental Health Counselors. These high-wage occupations predict strong employment growth in North Carolina.

## North Carolina Statewide Employment Trends

North Carolina is projected to add 445,700 new jobs between 2021 and 2030, an increase of 9%. During this same period, more than 6.3 million job openings (705,600 annually) are projected from a combination of new job creation and workers leaving their current jobs as they exit the labor force or change occupations.

The fastest **new job growth** is in computer and mathematical occupations (21%) which includes college-level jobs, followed by healthcare support, personal care and service, and food preparation and serving occupations which primarily include non-college level jobs.

The greatest **number of job openings** over the next decade are expected in non-college level occupations, which tend to experience more worker turnover (see Figure 1). Among occupations with heavy concentrations of college-level jobs, those with the most job openings include management (36,400 annually), business and financial operations (36,000 annually), and educational instruction and library (30,400 annually).

### Program Analysis

The program analysis demonstrates how well UNCG's current academic programs serve the North Carolina state economy and the student populations enrolled post-graduation. In both the program and gap analyses, programs are organized into three employment categories:

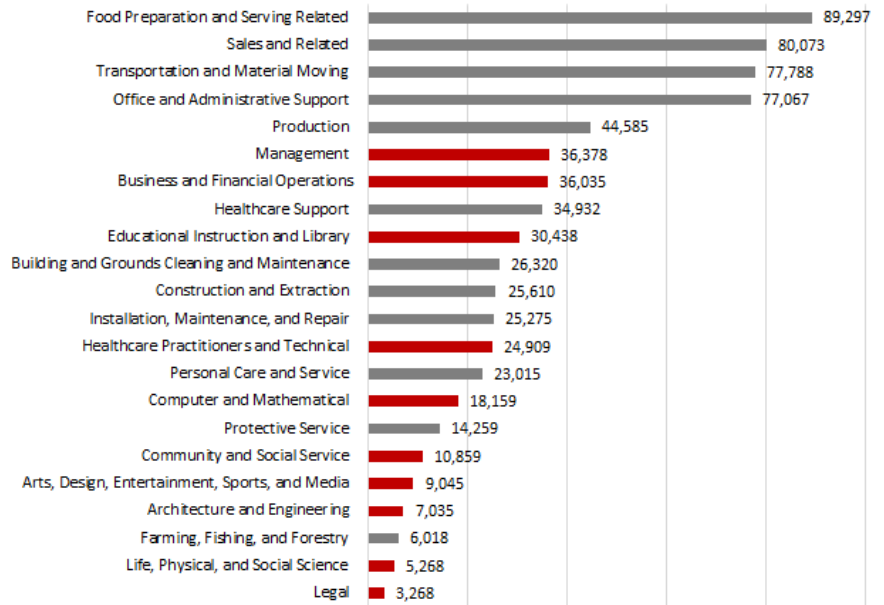
1. **Strong Employment Outlook** – at or above average new job growth *and* job openings
2. **Moderate Employment Outlook** - new job growth at or above average *and* below-average job openings **OR** below-average new job growth *and* job openings at or above average
3. **Weak Employment Outlook** - below average new job growth *and* below average job openings

and two wage areas:

1. **High Wage** - equal or exceeding the median annual wage
2. **Low Wage** - below median annual wage

Results from the program analysis show that the majority of UNCG's current academic programs (130 or 70%) have a strong or moderate employment outlook (see Table 1). These programs are equally distributed within these two employment outlook categories, and nearly all programs with strong employment outlook offer higher than median wages (34%), as do most programs with a moderate outlook (31%). Even programs with a weak employment outlook tend to offer high wages, but eight programs (4%) offer low wages and a weak employment outlook.

Figure 1: North Carolina Projected Annual Job Openings by Occupational Group, 2021-2030



Note: Red bars indicate the typical education level for that occupation includes a college degree.  
Source: rpk GROUP analysis of North Carolina Occupational Employment Projections, 2021-2030, North Carolina Department of Commerce.

**Table 1: Employment and Wage Outlook for UNCG Academic Programs**

Employment Outlook	Wage Category	Program Count	Program % Distribution
Strong Employment Outlook	High Wage	64	34%
	Low Wage	1	1%
<b>Strong Employment Outlook Total</b>		<b>65</b>	<b>35%</b>
Moderate Employment Outlook	High Wage	57	31%
	Low Wage	8	4%
<b>Moderate Employment Outlook Total</b>		<b>65</b>	<b>35%</b>
Weak Employment Outlook	High Wage	28	15%
	Low Wage	8	4%
	No Wage Category	3	2%
<b>Weak Employment Outlook Total</b>		<b>39</b>	<b>21%</b>
No Employment Category		17	9%
<b>No Employment Category Total</b>		<b>17</b>	<b>9%</b>
<b>Total</b>		<b>186</b>	<b>100%</b>
<b>Average New Job Growth in NC 9.1%   Average Annual Job Openings in NC 857   Median Annual Wage in NC \$47,745</b>			
Note: The 'no employment category' includes 1) occupations without projections because they do not meet the North Carolina Department of Commerce's reporting threshold, or 2) occupations without a match in the Classification of Instructional Programs (CIP) – Standard Occupational Classification (SOC) crosswalk and a custom match could not be identified. All programs linked to the liberal arts index (occupations in which liberal arts graduates are often employed; see Appendix) are categorized as having a Strong Employment Outlook and High Wage; these programs are <b>not</b> included in this table. Source: rpk GROUP analysis of UNCG Academic Programs data and NC Department of Commerce Employment Projections, 2021-2030.			

UNCG’s academic programs with the most promising employment outlook and high wages are found across six different colleges and at all award levels (See Table 2). Each of these programs prepares students for occupations where new job growth is projected to equal or exceed 25% and approximately 1,000 or more annual job openings.

Among the programs with the strongest outlook, bachelor’s and master’s degrees in **Computer Science** are linked to occupations where more than 10,000 job openings are expected annually. Master’s degrees in **Informatics & Analytics** and bachelor’s degrees in **Information Science** are both expected to provide access to occupations where more than 7,000 job openings are expected annually. Doctoral-level **Nursing** programs are preparing graduates for occupations projected to grow by 40% over the next decade and expected to offer about 1,100 job openings annually. Occupations tend to employ workers with different levels of educational preparation, so different degrees and certificates offered within similar programs may provide access to the same occupations. Differing education levels could lead to different levels of responsibility and wages earned within those occupations.

UNCG graduates with liberal arts degrees (see Appendix, Table A2) can also expect to find strong employment opportunities in North Carolina. rpk GROUP compiled an index of jobs where liberal arts graduates have been historically employed (see Appendix, Table A1). These occupations are collectively expected to grow 12.8% between 2021 and 2030 and offer 81,500 annual job openings, alongside above-median wages.

**Table 2: Top 10 UNCG Programs with Strong Employment Outlook and High Wages**

College/School	Department	Program	Award	Projected New Job Growth 2021-2030	Projected Average Annual Job Openings 2021-2030	Median Annual Wage 2021
Nursing	Nursing	Doctor of Nursing Practice	Doctorate	40%	1,103	\$94,458
Nursing	Nursing	Nursing	Doctorate	40%	1,103	\$94,458
Business and Economics	Consumer Apparel-Retail Studies	Global Apparel Supply Chain Management	Certificate	36%	969	\$63,640
Business and Economics	Info Systems and Supply Chain Management	Supply Chain Management	Certificate	36%	969	\$63,640
Interdisciplinary	Health Management	Health Management	Master's	32%	1,776	\$99,630
Arts and Sciences	Informatics and Analytics	Informatics & Analytics	Master's	29%	7,802	\$112,989
Education	Library & Information Science	Information Science	Bachelor's	28%	7,684	\$112,252
Arts and Sciences	Computer Science	Computer Science	Master's	27%	10,827	\$109,386
Arts and Sciences	Computer Science	Computer Science	Bachelor's	27%	11,241	\$107,781
Health and Human Sciences	Public Health Education	Community Health Education	Doctorate	25%	1,468	\$105,250

Note: Programs aligned with occupations accessible to liberal arts graduates are not included in this table because none were in the top 10 ranking. Occupations may map to multiple programs because there are various degrees and programs that prepare students to access a particular occupation; in these instances, different programs may display the same employment and wage data.  
 Source: rpk GROUP analysis of UNCG Academic Programs data and NC Department of Commerce Employment Projections, 2021-2030.

UNCG also offers several programs with weak employment and earnings prospects (see Table 3). These programs are concentrated in the College of Visual/Performing Arts and the School of Business and Economics. Employment opportunities for certificates, master's and doctoral degrees in music, performance, and study have below average job growth, annual openings, and wages. Similarly, the five programs offered in the department of consumer apparel-retail studies are preparing students across all degree levels for occupations with little expected growth.

**Table 3: UNCG Programs with Weak Employment Outlook and Low Wages**

College/School	Department	Program	Award	Projected New Job Growth 2021-2030	Projected Average Annual Job Openings 2021-2030	Median Annual Wage 2021
Visual/Performing Arts	School of Music	Music	Doctorate	8%	815	\$35,726
Visual/Performing Arts	School of Music	Performance	Master's	8%	815	\$35,726
Visual/Performing Arts	School of Music	Music Performance Study	Certificate	8%	529	\$ 14,442
Business and Economics	Consumer Apparel-Retail Studies	Consumer, Apparel, and Retail Studies	Bachelor's	1%	12	\$ 31,260
Business and Economics	Consumer Apparel-Retail Studies	Consumer, Apparel, and Retail Studies	Doctorate	1%	15	\$31,260
Business and Economics	Consumer Apparel-Retail Studies	Global Fashion Industry Management	Certificate	1%	12	\$31,260
Business and Economics	Consumer Apparel-Retail Studies	Retail Consumer Data Analytics	Certificate	1%	12	\$31,260
Business and Economics	Consumer Apparel-Retail Studies	Retail Studies	Master's	1%	12	\$31,260

Note: Occupations may map to multiple programs because there are various degrees and programs that prepare students to access a particular occupation; in these instances, different programs may display the same employment and wage data.

As we look within individual UNCG schools, it's clear that all schools (except nursing) offer programs with strong, moderate, and weak employment outlooks (see Table 4). All Nursing school programs are well-positioned to prepare graduates for occupations with strong employment opportunities and high wages. The School of Business and Economics also offers a high concentration of programs (74%) with similarly strong employment growth and wages.

The College of Visual/Performing Arts offers programs with a variety of employment outlooks, but about 60% of their programs are linked to occupations with a weak employment outlook; even so, half of those programs still offer high wages. The Joint School of Nanoscience/Nanoengineering is the only college or school without programs linked to occupations with a strong employment outlook; three out of seven programs it offers have a weak employment outlook, although all programs are linked to occupations that offer higher than median wages.

**Table 4: Employment and Wage Outlook Distribution Across Colleges and Schools (Program Count & Distribution)**

Employment Outlook	Wage Category	Arts and Sciences	Visual/ Performing Arts	Health and Human Sciences	Nanoscience / Nano-engineering	Business and Economics	Education	Nursing
Strong Employment Outlook	High Wage	18 (35%)	1 (4%)	5 (15%)		26 (74%)	6 (21%)	8 (100%)
	Low Wage			1 (3%)				
Moderate Employment Outlook	High Wage	20 (38%)	4 (17%)	15 (44%)	2 (29%)	1 (3%)	16 (55%)	
	Low Wage	1 (2%)	1 (4%)	6 (18%)				
Weak Employment Outlook	High Wage	7 (13%)	8 (35%)	3 (9%)	3 (43%)	2 (6%)	5 (17%)	
	Low Wage		3 (13%)			5 (14%)		
	No Wage Category		3 (13%)					
No Employment Category	No Wage Category	6 (12%)	3 (13%)	4 (12%)	2 (29%)	1 (3%)	2 (7%)	
<b>Total</b>		<b>52 (100%)</b>	<b>23 (100%)</b>	<b>34 (100%)</b>	<b>7 (100%)</b>	<b>35 (100%)</b>	<b>29 (100%)</b>	<b>8 (100%)</b>

Note: There are 188 total programs shown in this table because two programs are affiliated with more than one college/school.

Source: rpk GROUP analysis of UNCG Academic Programs data and NC Department of Commerce Employment Projections, 2021-2030.

## Competitor Analysis

The competitor analysis examines the market viability and opportunity of the academic programs currently offered by UNCG. Information from the National Student Clearinghouse was used to identify UNCG's 10 largest competitor institutions, all of which are located in North Carolina (see Appendix, Table A3). By connecting competitor program awards to similar programs at UNCG, the market saturation (number of competitors offering the program) and program demand (competitor growth in degree and certificates awarded) can be assessed within the competitor space. Programs are organized into three categories informed by market saturation and competitor growth in degree and certificate awards:

1. **Strong Market Opportunity** - below 50% market saturation & at least 50% of competitors offering the program demonstrate positive growth



2. **Moderate Market Opportunity** - below 50% market saturation & less than 50% of competitors offering the program demonstrate positive growth OR Above 50% market saturation & at least 50% of competitors offering the program demonstrate positive growth
3. **Limited Market Opportunity** - above 50% market saturation & less than 50% of competitors offering the program demonstrate positive growth

Results from the competitor analysis show that 30% of UNCG’s current programs are strongly positioned to take advantage of market opportunities, with anticipated student interest and few offerings among competitor institutions (see Table 5). Two-thirds of these programs offer bachelor’s degree (11%) or postbaccalaureate certificates (9%). Another quarter of UNCG’s programs indicate moderate market opportunities, with most at the bachelor’s (11%) and master’s (9%) degree levels. Only 11% of UNCG’s programs are expected to have limited market opportunity because of strong competition or limited visible demand among the university’s competitors.

**Table 5: Market Opportunity for UNCG Academic Programs**

Market Opportunity	Award	Program Count	Program % Distribution
Strong Market Opportunity	Bachelor's	23	11%
	Postbaccalaureate certificate	20	9%
	Master's	14	7%
	Doctorate	8	4%
<b>Strong Market Opportunity Total</b>		<b>65</b>	<b>30%</b>
Moderate Market Opportunity	Bachelor's	24	11%
	Postbaccalaureate certificate	3	1%
	Master's	19	9%
	Post-master's certificate	1	0%
	Doctorate	9	4%
<b>Moderate Market Opportunity Total</b>		<b>56</b>	<b>26%</b>
Limited Market Opportunity	Bachelor's	14	7%
	Master's	9	4%
<b>Limited Market Opportunity Total</b>		<b>23</b>	<b>11%</b>
No Competitor Data	Bachelor's	4	2%
	Postbaccalaureate certificate	39	18%
	Master's	14	7%
	Post-master's certificate	3	1%
	Doctorate	11	5%
<b>No Competitor Data Total</b>		<b>71</b>	<b>33%</b>
<b>Total</b>		<b>215</b>	<b>100%</b>

Note: 'No Competitor Data' indicates a competitor could offer the program, but completions are <1 across FY18 – FY21; alternately, competitors may classify a similar program using a different CIP code.  
Source: rpk GROUP analysis of IPEDS Completions Survey, 2018-2021.

In the School of Business and Economics more than 40% of the programs are expected to have a strong market position (see Table 6). In addition, 30% or more of programs offered in the College of Arts and Sciences, Schools of Health and Human Sciences, Education, and Joint School of Nanoscience/Nanoengineering are strongly positioned to serve student

interested in the current market environment. The Colleges of Arts and Sciences, offers the greatest number of programs (12, or 17%) with the limited market opportunities because of low student demand or strong existing competition.

**Table 6: Market Opportunity Distribution Across Colleges and Schools (Program Count and Distribution)**

Market Opportunity	Arts and Sciences	Visual/ Performing Arts	Health and Human Sciences	Nanoscience / Nano-engineering	Business and Economics	Education	Nursing
Strong Market Opportunity	21 (30%)	3 (10%)	13 (36%)	2 (29%)	15 (43%)	11 (38%)	
Moderate Market Opportunity	23 (32%)	10 (32%)	11 (31%)		4 (11%)	6 (21%)	3 (38%)
Limited Market Opportunity	12 (17%)	3 (10%)	1 (3%)		2 (6%)	4 (14%)	1 (13%)
No Competitor Data	15 (21%)	15 (48%)	11 (31%)	5 (71%)	14 (40%)	8 (28%)	4 (50%)
<b>Total</b>	<b>71 (100%)</b>	<b>31 (100%)</b>	<b>36 (100%)</b>	<b>7 (100%)</b>	<b>35 (100%)</b>	<b>29 (100%)</b>	<b>8 (100%)</b>

Note: 'No Competitor Data' indicates competitors could offer a program, but awards are <1 across FY18 – FY21; alternately, competitors may use a different CIP code to classify a similar program. There are 217 total programs shown in this table because two programs are affiliated with more than one college/school.  
 Source: rpk GROUP analysis of IPEDS Completions Survey, 2018-2021.

### Gap Analysis

The gap analysis takes a statewide perspective on employment growth. It looks to identify occupations where strong or moderate job growth is expected in North Carolina, but UNCG does not offer any programs preparing students for those jobs. The gap analysis highlights areas of consideration for potential academic program development.

The gap analysis reveals eight occupations at various degree levels that could be candidates for program consideration (see Table 7). The occupations are centered in health care, engineering, and the legal field. Development of these programs may require creating new colleges, schools, or departments since few are aligned with existing UNCG schools.

**Table 7: Occupations with Strong/Moderate Employment Outlook, High Wages, and No Affiliated UNCG Program**

Occupation Code (SOC)	Occupation	Typical Educational Requirement	Projected New Job Growth 2021-2030	Projected Average Annual Job Openings 2021-2030	Median Annual Wage 2021
29-1071	Physician Assistants	Master's	29%	624	\$107,330
21-1018	Substance Abuse, Behavioral Disorder, and Mental Health Counselors	Bachelor's	24%	1,349	\$48,640
29-1123	Physical Therapists	Doctoral/ Professional	19%	532	\$79,240
17-2112	Industrial Engineers	Bachelor's	16%	818	\$81,380
17-2051	Civil Engineers	Bachelor's	14%	1,107	\$78,960
17-2141	Mechanical Engineers	Bachelor's	12%	711	\$79,570
23-1011	Lawyers	Doctoral/ Professional	11%	1,133	\$105,140
29-2010	Clinical Laboratory Technologists and Technicians	Bachelor's	9%	1,077	\$48,000

Note: Table includes high-wage occupations with a strong employment outlook, and high-wage occupations with a moderate employment outlook where new job growth is above average and annual job openings are greater than 500. Occupations accessible with a liberal arts degree are excluded from this table.  
 Source: rpk GROUP analysis of UNCG Academic Programs data and NC Department of Commerce Employment Projections, 2021-2030.

In the health field, **Physician Assistants and Physical Therapists** both require graduate-level programs, while **Clinical Laboratory Technologists and Technicians** typically earn bachelor's degrees. **Substance Abuse, Behavioral Disorder, and Mental Health Counselors** are other health-related occupations requiring bachelor's degrees.

Within engineering, **Civil and Mechanical Engineers** are expected to offer strong employment opportunities and require only bachelor's degree programs. While **Lawyers** will have similar opportunities, preparing students for those opportunities would require the creation of a post-graduate professional school.

**Table 8: Competitor Analysis for Areas Identified as UNCG Program Gaps**

Occupation	Programs Linked to Occupation	UNCG Competitors Offering the Program	Average Awards per Year	Number of Competitors by Growth Trend 2017-2021		
				Positive	None	Negative
<b>Strong Employment Outlook</b>						
Civil engineers	Civil Engineering, General - Bachelor's	2	118	2	0	0
	Civil Engineering, General - Master's	2	41	2	0	0
	Construction Engineering - Bachelor's	1	16	0	1	0
	Construction Engineering - Master's	1	4	1	0	0
Clinical laboratory technologists and technicians	Clinical Laboratory Science/Medical Technology/Technologist - Bachelor's	3	25	2	0	1
	Clinical Laboratory Science/Medical Technology/Technologist - Master's	1	5	0	0	1
Lawyers	Law – Doctorate/Professional	2	162	0	0	2
	Programs for Foreign Lawyers - Master's	1	2	0	0	1
Substance abuse, behavioral disorder, and mental health counselors	Mental Health Counseling/Counselor - Master's	2	24	1	0	1
	Substance Abuse/Addiction Counseling – Postbaccalaureate certificate	3	8	2	1	0
	Trauma Counseling - Postbaccalaureate certificate	1	5	1	0	0
<b>Moderate Employment Outlook</b>						
Industrial engineers	Engineering/Industrial Management - Bachelor's	1	15	1	0	0
	Engineering/Industrial Management - Master's	2	20	1	0	1
	Industrial Engineering - Bachelor's	1	92	1	0	0
	Industrial Engineering - Master's	1	56	1	0	0
	Manufacturing Engineering - Master's	1	43	1	0	0
	Systems Engineering - Bachelor's	1	47	0	0	1
Mechanical engineers	Mechanical Engineering - Bachelor's	2	236	1	0	1
	Mechanical Engineering - Master's	2	63	1	0	1
	Mechanical Engineering – Postbaccalaureate certificate	1	1	1	0	0
Physical therapists	Kinesiotherapy/Kinesiotherapist - Master's	1	13	0	0	1
	Physical Therapy/Therapist - Doctorate	4	34	2	1	1
Physician assistants	Physician Associate/Assistant - Master's	2	26	1	0	1
<i>Source: rpk GROUP analysis of NC Department of Commerce Employment Projections, 2021-2030 and IPEDS Completions Survey, 2017-2021.</i>						

This analysis also considered other state colleges and universities that may already offer programs preparing students for these jobs. It includes the same ten institutions included in the competitor analysis (see Appendix, Table A3). The data show that very few UNCG competitors, generally one or two institutions, offer the programs that will prepare students for these growing occupations. Only one program, a physical therapist doctoral degree, was offered by almost half of the competitor institutions (see Table 8).

The **civil, mechanical, and industrial engineering** programs produce the largest number of degrees across the competitors, along with **law** programs. While this signals that sizable programs already exist elsewhere in the state, the trend among degree completions in the engineering programs is largely positive, suggesting there is strong student demand. However, all the competitors offering law programs showed a negative trend in completions, suggesting weak student demand.

Six competitors offer programs preparing students for jobs as **Substance Abuse, Behavioral Disorder, and Mental Health Counselors**. They produce fewer graduates, but the positive trend in degree production for these programs suggests opportunity may be available in the higher education marketplace for more programs.

## Conclusion

The MDO analysis collectively shows that the majority of UNCG's academic programs are strongly or moderately aligned with expected employment opportunities in North Carolina over the next decade. And regardless of the employment outlook, 88% of UNCG programs are expected to provide students with access to occupations that offer above median wages. Programs with the strongest employment outlook are concentrated in Nursing, Business and Economics, and Computer Science. However, the School of Business and Economics, along with the School of Visual/Performing Arts, also offers multiple programs with poor employment prospects over the next decade.

An examination of programs offered by UNCG's competitors indicates that 30% of UNCG's programs are expected to offer strong market opportunities going forward, meaning the current competitor landscape is not currently saturated and there is evidence of student demand. The strongest opportunities for continued or increased investment in current UNCG programs are among the bachelor's degree program offerings, and particularly in the Schools of Business and Economics, and Education. The College of Arts and Sciences offers a variety of programs with strong and moderate market opportunities, but also houses the largest number of programs with weak market opportunities.

UNCG could consider adding new bachelor's degree programs in civil, industrial, and mechanical engineering to prepare students for these engineering jobs, which are projected to offer high wages and strong employment opportunities over the next decade. However, those new programs would be a significant investment for UNCG. New bachelor's degree programs preparing students for jobs as Substance Abuse, Behavioral Disorder, and Mental Health Counselors may also warrant consideration.

## Appendix

The goal of the MDO’s **program analysis** is to determine how well programs currently offered at UNCG serve 1) the North Carolina state economy and 2) the student populations enrolled post-graduation. The MDO **gap analysis** uses the same information but examines it from a different perspective and identifies 1) the occupations offering the greatest well-paid employment opportunities in North Carolina over the next decade, and 2) whether UNCG currently offers programs to prepare students for those jobs.

The **competitor analysis** also examines the landscape outside of UNCG by looking at which other higher education competitor institutions may be offering similar academic programs and evaluating the comparative strength of those programs. This information 1) identifies programs in which UNCG may or may not have a competitive advantage, and 2) identifies potential areas of market growth or market saturation, which can inform decisions around investments in current or new academic programs.

### **Program and Gap Analysis Methodology**

The MDO analysis uses publicly available employment projections and wage data and connects it to academic programs at UNCG using a crosswalk. The employment and wage data are from North Carolina’s Department of Commerce and the analysis metrics include: 2021-2030 projected new job growth, 2021-2030 projected average annual job openings, and 2021 median annual wages. rpk GROUP created an enhanced version of the Department of Education’s CIP-SOC<sup>1</sup> crosswalk, integrating occupational education and experience requirements from the Bureau of Labor Statistics.

The North Carolina occupations and the associated employment and wage data were attached to the crosswalk by SOC code, and then the UNCG academic programs were attached by CIP code. The analyses were conducted at the six-digit CIP code and degree type (bachelor’s degree, postbaccalaureate certificate, master’s degree, post-master’s certificate, and doctorate degree).

### *Liberal Arts Index*

rpk GROUP's Liberal Arts Index accounts for the varied employment opportunities available to liberal arts graduates and incorporated it into the custom CIP-SOC crosswalk. The method identifies ‘liberal arts’ programs, identifies jobs accessible to students with liberal arts degrees (see Table A1), and applies the index to all identified liberal arts programs at the bachelor’s degree award level (see Table A2).

**Table A1: rpk GROUP Liberal Arts Index Occupations (Bachelor’s Degrees)**

Advertising and promotions managers	Mental health counselors
Sales managers	Substance abuse, behavioral disorder, and mental health counselors
Administrative services managers	Mental health and substance abuse social workers
Education administrators, preschool and childcare center/program	Child, family, and school social workers
Education administrators, all other	Social workers, all other
Medical and health services managers	Health educators
Social and community service managers	Probation officers and correctional treatment specialists
Managers, all other	Community and social service specialists, all other

<sup>1</sup> ‘CIP’ codes are standard ‘classification of instructional programs’ codes assigned to each program. ‘SOC’ codes are ‘standard occupational codes’ assigned to all occupations. This analysis uses the current 2020 CIP codes and 2018 SOC codes.

Agents and business managers of artists, performers, and athletes Buyers and purchasing agents Buyers and purchasing agents, farm products Wholesale and retail buyers, except farm products Purchasing agents, except wholesale, retail, and farm products Compliance officers Cost estimators Human resources specialists Labor relations specialists Logisticians Management analysts Meeting, convention, and event planners Fundraisers Compensation, benefits, and job analysis specialists Training and development specialists Market research analysts and marketing specialists Business operations specialists, all other Property Appraisers and Assessors Appraisers and assessors of real estate Budget analysts Credit analysts Financial analysts Personal financial advisors Insurance underwriters Financial examiners Credit counselors Loan officers Tax examiners and collectors, and revenue agents Financial specialists, all other Computer systems analysts Information security analysts Computer programmers Software developers Software quality assurance analysts and testers Web developers Database administrators Network and computer systems administrators Computer network support specialists Computer occupations, all other Operations research analysts Miscellaneous mathematical science occupations Mathematical science occupations, all other Foresters Geographers Forensic science technicians Substance abuse and behavioral disorder counselors Clergy Directors, religious activities, and education	Religious workers, all other Arbitrators, mediators, and conciliators Paralegals and legal assistants Legal support workers, all other Career/technical education teachers, postsecondary Preschool teachers, except special education Kindergarten teachers, except special education Elementary school teachers, except special education Middle school teachers, except special and career/technical education Career/technical education teachers, middle school Secondary school teachers, except special and career/technical education Career/technical education teachers, secondary school Adult basic education, adult secondary education, and English as a second language instructors Teachers and instructors, all other, except substitute teachers Substitute teachers, short-term Teachers and instructors, all other Museum technicians and conservators Education instruction and library workers, all other Fine artists, including painters, sculptors, and illustrators Special effects artists and animators Fashion designers Graphic designers Set and exhibit designers Designers, all other Actors Producers and directors Coaches and scouts Music directors and composers Broadcast announcers and radio disc jockeys News Analysts, Reporters, and Journalists Public relations specialists Editors Technical writers Writers and authors Interpreters and translators Broadcast technicians Sound engineering technicians Camera operators, television, video, and film Film and video editors Securities, commodities, and financial services sales agents Sales representatives, wholesale and manufacturing, technical and scientific products Sales engineers Proofreaders and copy markers Statistical assistants
--	--



**Table A2: UNCG Liberal Arts Bachelor’s Degree Programs**

African American and African Diaspora Studies	Liberal and Interdisciplinary Studies
Anthropology	Media Studies
Art	Music
Arts Administration	Peace and Conflict Studies
Classical Studies	Performance
Communication Studies	Philosophy
Dance (Choreography and Performance)	Political Science
Dance Studies	Psychology
Drama	Religious Studies
English	Social Work
Geography	Sociology
History	Spanish
Integrated Professional Studies	Studio Art
Interior Architecture	Women’s, Gender, and Sexuality Studies
Languages, Literatures, and Cultures	

**Competitor Analysis Methodology**

The competitor analysis includes institutions identified from UNCG-provided data originally obtained from the National Student Clearinghouse. Ten competitors were identified based on the number of students who applied to UNCG but did not attend, and instead enrolled in other institutions. While not intentionally limited to North Carolina, UNCG’s largest competitors were located within the state (see Table A3).

**Table A3: UNCG Competitor Analysis Institutions**

<b>UNCG Competitor Institutions</b>	<b>Number UNCG Applicants (Entering into the 2022 Cohort Year) Who Enrolled at Competitor Four-Year Institutions</b>
Appalachian State University	571
East Carolina University	522
Fayetteville State University	84
North Carolina Central University	123
North Carolina State University at Raleigh	564
University of North Carolina at Chapel Hill	980
University of North Carolina at Charlotte	420
University of North Carolina Wilmington	261
Western Carolina University	166
Winston-Salem State University	92

The competitor analysis uses publicly available data on degrees and certificates awarded from the Integrated Postsecondary Education Data System (IPEDS). The data on competitor awards is connected to academic programs currently offered at UNCG, as well as programs identified in the gap analysis as potential opportunities for new program creation. The unit of analysis and the connection point between UNCG programs and competitor programs is the 6-digit CIP code plus the type of award (bachelor’s degree, postbaccalaureate certificate, master’s degree, post-master’s certificate, or doctoral/professional degree).

For each program, analysis metrics include market saturation and program demand calculated using 2018-2021 IPEDS degree and certificate awards data.

- Market Saturation = # institutions offering program/10
- Program Demand = Ratio of competitors offering the program demonstrating positive growth

Seventy of UNCG’s program offerings were not offered as competing programs by the 10 competitor institutions (see Table A4).

**Table A4: UNCG Academic Programs Without Competitor Data**

<p>Analytical Instrumentation - Certificate  Consumer, Apparel, and Retail Studies - Doctorate  Global Fashion Industry Management - Certificate  Retail Consumer Data Analytics - Certificate  Retail Merchandising Management - Certificate  Retail Studies - Master's  Applied Statistics - Master's  Athlete Well-Being - Certificate  Chemistry and Biochemistry - Doctorate  Synthetic Biology - Certificate  Economics - Doctorate  Leadership in Infant and Toddler Learning - Certificate  Communication Sciences and Disorders - Doctorate  Computational Mathematics - Doctorate  Information Systems and Supply Chain Management - Bachelor's  Information Technology Development - Certificate  Information Technology Management - Certificate  Special Endorsement in Computer Education - Certificate  Dance - Certificate  Dance - Master's  Business Analytics - Certificate  Dance Education - Master's  Birth-Kindergarten Initial Licensure - Certificate  Birth-Kindergarten Interdisciplinary Studies in Education and Development - Master's  Quantitative Business Economics - Certificate  Instructional Coaching - Certificate  Interpreting, Deaf Education and Advocacy Services - Bachelor's  Educational Assessment - Certificate  Educational Research, Measurement, and Evaluation - Doctorate  Educational Research, Measurement, and Evaluation - Master's  e-Learning - Certificate  Environmental Humanities - Certificate  Kinesiology - Doctorate  Historic Preservation - Certificate  Human Development and Family Studies - Bachelor's</p>	<p>Human Development and Family Studies - Doctorate  Genetic Counseling - Master's  Informatics &amp; Analytics - Master's  Interior Architecture - Master's  International Business - Master's  Global Studies - Certificate  Information Systems - Doctorate  Advanced Materials - Certificate  Medical Science - Certificate  Music Education - Certificate  Historical Keyboard Performance - Certificate  Jazz Studies - Certificate  Music - Doctorate  Music Education - Doctorate  Music Technology - Certificate  Music Composition - Certificate  Music Theory - Certificate  Music Theory - Master's  Music Theory Pedagogy - Certificate  Ethnomusicology - Certificate  Musicology - Certificate  Advanced Practice Foundations - Certificate  Nursing - Certificate  Nursing - Master's  Nursing Leadership and Management - Certificate  Dietetic Internship - Certificate  Nanoscience - Certificate  Urban and Economic Development - Certificate  Workplace Wellness - Certificate  Languages, Literatures, and Cultures - Master's  Cultural Foundations and Social Justice Education - Certificate  Geography, Secondary Education - Bachelor's  Climate Justice - Certificate  Sustainability - Certificate  Taxation - Certificate  Women’s, Gender, and Sexuality Studies - Master's</p>
--	---

**From:**  
**To:** [Mike Daly](#)  
**Cc:** [Bob Shea](#); [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Market Opportunity Analysis  
**Date:** Wednesday, June 28, 2023 2:19:08 PM  
**Attachments:** [Outlook-r041baee.png](#)

---

Thank you Mike. Please share with \_\_\_\_\_ given the PRTF's questions regarding this analysis. I'll also post on the website, share with deans, and with faculty senate chair

University of North Carolina Greensboro  
Greensboro, NC 27412

---

**From:** Mike Daly <mdaly@rpkgroup.com>  
**Sent:** Wednesday, June 28, 2023 2:09 PM  
**To:**  
**Cc:** Bob Shea \_\_\_\_\_ ; Katie Hagan <khagan@rpkgroup.com>  
**Subject:** UNCG/rpk Market Opportunity Analysis

Hello

Attached please find the Market Demand & Opportunity Analysis that rpk GROUP prepared for UNCG. This copy is for public sharing, as you deem necessary.

Supporting data files will be shared with UNCG IR per project protocols.

Please let me know if you have any questions.

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#);  
**Cc:** [Mike Daly](#)  
**Subject:** Weekly Update  
**Date:** Friday, June 30, 2023 6:35:25 AM  
**Attachments:** [UNCG Weekly Project Update 2023.06.30.pdf](#)

---

Hi Bob and \_\_\_\_\_,

Great to see you both on Wednesday - we really enjoyed the conversation and are excited about the next and final steps in our work together. Attached is our typical weekly update. We will skip the update next week since it's a short week and Mike is out, but will continue the administrative services analyses work through next week and will meet with \_\_\_\_\_ on net revenue. I will get you a draft administrative services memo by the 17th.

Mike is scheduled with the task force on July 19 and the Deans at the end of the month. The main outstanding meeting we discussed that will need to be booked is the conversation with \_\_\_\_\_ and the shorter pre-meeting that should occur before that with key attendees. We also would like to have a meeting with you all before the end of July, so we'll work with \_\_\_\_\_ on that. Please let me know if you have any questions or need anything over the next couple of weeks as we get these last pieces finalized.

Enjoy the long weekend!

Katie

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UNCG



# UNCG & rpk GROUP

Status Report:  
June 30, 2023

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# Project Overview: June 26 – June 230

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>• Provided introduction to academic data dashboard to project leaders (6/28).</li> <li>• Reviewed net revenue analysis with project leaders (6/28).</li> </ul>	<ul style="list-style-type: none"> <li>• Scheduling and facilitating final Data Team meeting.</li> <li>• Scheduling meeting with Provost's Portfolio Review Taskforce to provide dashboard introduction.</li> <li>• Scheduling meeting with _____ and others to provide dashboard introduction.</li> <li>• Finalizing HR analyses to support ASR work.</li> <li>• Meeting with _____ to discuss the net revenue analysis.</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>• Reviewed net revenue analysis.</li> </ul>	<ul style="list-style-type: none"> <li>• Initiating hosting and enabling access to dashboards for stakeholder groups.</li> <li>• Coordinating meetings with stakeholders to provide dashboard introduction.</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started



# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	On Track	On Track	On Track														
Dashboard Development															On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	At Risk	Complete	Complete						
Dashboards Shared with Deans																						Off Track	Off Track	Off Track	Off Track	Not Started	Not Started	Not Started	Not Started	Not Started	
Dashboards Shared with Chairs																						Off Track	Off Track	Off Track	Off Track	Not Started	Not Started	Not Started	Not Started	Not Started	
Dashboards Shared with Taskforce																							Off Track	Off Track	Off Track	Not Started	Not Started	Not Started	Not Started	Not Started	
Faculty Workshops										Complete	Complete	On Track	On Track	On Track	On Track	On Track	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	On Track	On Track	On Track	Not Started	Not Started		

UNCG IR is coordinating hosting and sharing of Academic Data dashboards. Deans will have a training week of 7/24 with rpk and UNCG IR. Chairs and Program Directors will have a training with UNCG IR in early August.

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk														
Final Report & Recommendations																				Complete	Complete	Complete	At Risk	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track

Katie is working with [redacted] & team to conduct necessary data analyses to complete the ASR report.

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
UNCG/rpk Data Team meeting	Data Team members	TBD	Coordinating with UNCG IR
Dashboard Training for Academic Deans	[REDACTED] [REDACTED] and Mike Daly Daly	7/26; TBD	Finalizing agenda and working exercises

# Revised Timeline – Academic Data/Dashboard

Data	All Data Collected	Definitions and Methodology Confirmed	Data Validated	Beta Dashboard Launch and Feedback Period	Beta Dashboard Refined Based on Feedback
Academic Program List	3/24	4/18	4/27	6/12 – 6/30	7/3-8/1
Academic Structure	4/7	4/21	N/A		
Course Data	3/24	4/13	4/21		
Instructor Data	3/31	5/4	5/5		
Faculty Data	4/14	5/4	5/5		
Academic Program Data*	4/14	4/28	6/6		
Finance Data	3/24	5/19	5/26	N/A	N/A

Key	Complete	On Track	At Risk	Off Track	Not Started

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from mission to market



Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**From:** [Katie Hagan](#)  
**To:**  
**Cc:** [Mike Daly](#); [Bob Shea](#); [Raven Moody](#)  
**Subject:** Follow up - slide 11 in presentation  
**Date:** Wednesday, July 5, 2023 8:00:22 AM

---

Hi [redacted] and Bob,

Following up on our conversation last week about slide 11. Your question was what was included in the blue area on the 'indirect' side of the chart. On the slide, the description of that is: *Institutional fees (student activity, ed & tech, facility, etc.), noncapital gifts, and other unrestricted revenues not associated with an academic unit.* Where you can see those numbers in your spreadsheet is on the 'Summary' tab, all of the revenue minus the state appropriation that is labeled as unrestricted. So, the short answer to your question about whether or not all of the blue on the chart is tuition and fees is no, the blue area captures all unrestricted revenue except state appropriations, but all tuition (not all fees) are allocated on the 'direct' side of the model.

We can talk more about this the next time we meet if you'd like, and Raven and I will be sure to cover this with [redacted] as well.

Thanks,  
Katie

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khagan@rpkgroup.com | 757-589-0490



**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Project Update  
**Date:** Friday, July 14, 2023 11:27:27 AM  
**Attachments:** [Outlook-p0a30itf.png](#)  
[UNCG Weekly Project Update 2023.07.14.pdf](#)

---

Hi and Bob,

Attached is the weekly project update for your review. Please let me know if you have any questions.

Early next week I'll be sharing an agenda for our Wednesday meeting.

Have a great weekend!

Thanks again,  
Mike Daly

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# UNCG & rpk GROUP

## Status Report: July 14, 2023

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# Project Overview: July 3 – July 14

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>• Provided introduction to dashboards to Academic Leadership (7/11).</li> <li>• Provided introduction to dashboards to (7/12).</li> </ul>	<ul style="list-style-type: none"> <li>• Introduction to dashboards to Provost's Portfolio Review Taskforce (7/19).</li> <li>• Final Data Team meeting (7/20).</li> <li>• Updating Academic Net Revenue slides to show department-level data and trends</li> <li>• Reviewing memo from Provost's Portfolio Review regarding Market Demand analysis and preparing response.</li> <li>• Finalizing HR analyses to support ASR work.</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>• Assumed official control of hosting dashboards and facilitated rpk access for purposes of sharing with stakeholders as necessary.</li> <li>• Shared agenda with Deans for dashboard training on 7/26.</li> </ul>	<ul style="list-style-type: none"> <li>• Finalizing sharing of Academic Net Revenue data and presentation materials.</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete														
Dashboard Development																On Track	On Track	On Track	On Track	On Track	On Track	On Track	At Risk	Complete	Complete	Complete	Complete	Complete	Complete		
Dashboards Shared with Deans																						Off Track	Off Track	Off Track	Off Track	Not Started	Not Started	On Track	On Track	On Track	
Dashboards Shared with Chairs																						Off Track	Off Track	Off Track	Off Track	Not Started	Not Started	Not Started	Not Started	Not Started	
Dashboards Shared with Taskforce																								Off Track	Off Track	On Track	On Track	On Track	On Track		
Faculty Workshops										Complete	Complete	On Track	On Track	On Track	On Track	On Track	On Track	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	Not Started	Not Started	Not Started	Not Started	Not Started	

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May				June				July					
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk														
Final Report & Recommendations																				Complete	Complete	Complete	At Risk	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track

Katie is working with [redacted] & team to conduct necessary data analyses to complete the ASR report.

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Leaders meeting	[REDACTED] Bob, Katie and Mike	7/19, 8:30am	Review project tracker and academic net review data and materials
Provost's Portfolio Review Taskforce meeting	Taskforce members and Mike and [REDACTED]	7/19, 10:00am	
UNCG/rpk Data Team meeting	Data Team members and Mike	7/20; 9:30am	Final meeting
Dashboard Training for Academic Deans	[REDACTED] and Mike Daly	7/26; 2:30pm	



# Revised Timeline – Academic Data/Dashboard

Data	All Data Collected	Definitions and Methodology Confirmed	Data Validated	Beta Dashboard Launch and Feedback Period	Beta Dashboard Refined Based on Feedback
Academic Program List	3/24	4/18	4/27	6/12 – 6/30	7/3-8/1
Academic Structure	4/7	4/21	N/A		
Course Data	3/24	4/13	4/21		
Instructor Data	3/31	5/4	5/5		
Faculty Data	4/14	5/4	5/5		
Academic Program Data*	4/14	4/28	6/6		
Finance Data	3/24	5/19	5/26	N/A	N/A

Key

Complete

On Track

At Risk

Off Track

Not Started

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Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**From:**  
**To:** [Mike Daly](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Project Update  
**Date:** Friday, July 14, 2023 12:26:33 PM  
**Attachments:** [Outlook-p0a30itf.png](#)

---

Thanks Mike!

Enjoy your weekend,

---

**From:** Mike Daly <mdaly@rpkgroup.com>  
**Sent:** Friday, July 14, 2023 11:27 AM  
**To:** Bob Shea  
**Cc:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** UNCG/rpk Weekly Project Update

Hi            and Bob,

Attached is the weekly project update for your review. Please let me know if you have any questions.

Early next week I'll be sharing an agenda for our Wednesday meeting.

Have a great weekend!

Thanks again,  
Mike Daly

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Michael Daly | Senior Associate | [rpk GROUP](#)

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**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Project Leaders Meeting Agenda & Materials  
**Date:** Tuesday, July 18, 2023 2:33:51 PM  
**Attachments:** [Outlook-vxce5ir3.png](#)  
[UNCG Direct Net Revenue 2023.07.18.23\\_Shared.pdf](#)  
[UNCG HR Analyses Summary Memo\\_DRAFT\\_7.18.23.pdf](#)  
[UNCG Academic Cost and Revenue Analysis Public Table\\_7.18.23.pdf](#)

---

Hi [redacted] and Bob,

Katie and I are looking forward to our check-in tomorrow. We'd like to focus the conversation on these topics:

- Academic Department Financial Analysis Deck - attached
  - In addition to establishing methodology, this slide deck provides a focused view of the departments within Colleges & Schools; showing student credit hours, expenses, and net revenue.
- Academic Department Financial Analysis Table - attached (recommend downloading for optimal viewing)
- Response to the Market/Demand program analysis
  - rpk will issue an addendum to its narrative report that removes the recommendation of mental health counseling as an opportunity for UNCG. The PRTF is correct in noting that there are limitations in understanding degree to career trajectory in using the federal government's established CIP-SOC crosswalk as mapped to labor projections. With respect to the diversity of UNCG's portfolio and how a combination of other sources (College Scorecard, UNC System Office, U.S. Department of Education's CIP-SOC crosswalk, U.S. Department of Labor/North Carolina Department of Labor, etc.) could be considered, we would recommend that UNCG create a working group in coordination with IR to establish the data sources that can be regularly used to track career/degree outcomes of graduates. Until work is completed, we recommend removing labor-related outcomes from the PRTF's rubric.
- Administrative Services Review update - draft attached
  - Katie will walk through the recommendations tomorrow. Please note that it's still a draft and Katie is waiting to meet with [redacted] for final approval of the numbers.

Thanks again,  
Mike Daly

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# UNC Greensboro

Academic Department Analysis

July 18, 2023



# What's Included & What's Not?

- Finance Data Source: ODS Data Warehouse, Cash Basis
- Years: FY2020, FY2021 & FY2022
- Included:
  - Unrestricted revenues and expenses directly assigned to academic departments
  - Tuition & fees, scholarships/waivers
  - A portion of state appropriations
- Excluded:
  - Restricted, Auxiliary, Loan, Endowment, Agency, and Plant funds
  - Unrestricted fund activity, such as academic administration and institutional administration, not directly assigned to academic departments

# Expense Methodology

- All unrestricted fund expenses with a finance unit identified as an academic department are included. Expenses in other academic unit are excluded.
- Exceptions:
  - **Included**: Fund 112073-DNP Program Tuition Differential is assigned to org 12801-Dean's Office – NU, which is not an academic department. After discussion with dean, it was determined this should be included as a Nursing academic department expense, not a dean expense.
  - **Included**: Expenses for the Joint School of Nanosci/Nanoeng includes org 13201-Dean's Office – NN and 13202-Nanoscience. Unlike other schools, faculty are assigned to the dean's office org as their home department in HR data as well as charged there in finance data. 13202-Nanoscience contains mostly operational expenses.
  - **Excluded**: Differential tuition expense funds within the Bryan School. Per discussion with the dean, they centralize most of those expenses and are not directly related to the instruction of their programs. Thus, these are not included in the analysis.

# Revenue Methodology: Net Tuition & Fees

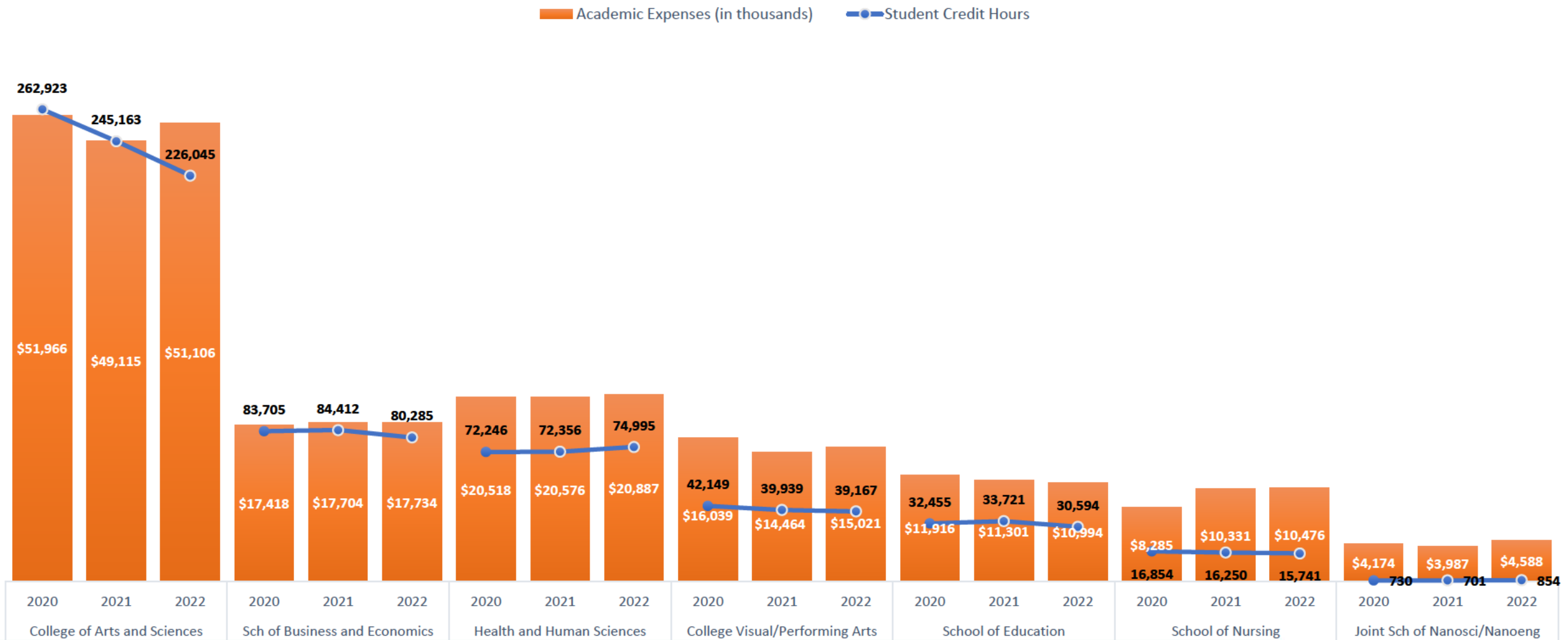
- Direct net tuition & fee revenues (includes scholarships and waivers) not assigned directly in financial data to an academic department unit are distributed based on one of the following attributes:
  - **All** – Allocated to all academic departments based on portion of total student credit hours produced.
  - **Level** – Allocated to academic departments based on portion of undergraduate or graduate student credit hours produced.
  - **Dept-Level** – Differential tuition and related expenses are assigned to the corresponding department at the graduate level.

# Revenue Methodology: State Appropriation

- State appropriation is allocated to academic departments using the current state funding model logic (amounts allocated to units proportional to the funding per credit hour/academic discipline per the FY23 UNC System formula).
- Only a portion of the state revenue is allocated to academic departments. The amount of state revenue allocated ensures that the total amount of revenue in the model is proportionally equal to the amount of expense in a given fiscal year.

# Colleges and Schools

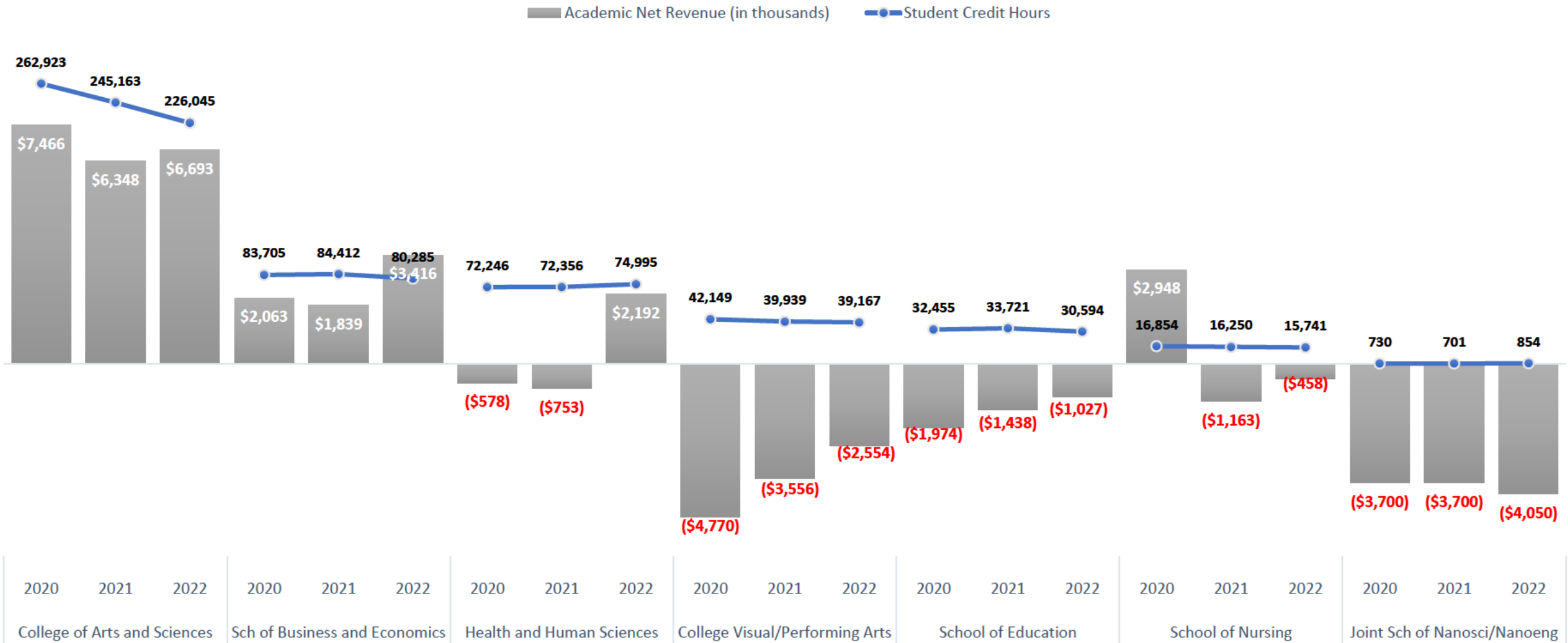
# Colleges & Schools – Student Credit Hours and Academic Expenses



Academic Expenses: All unrestricted fund expenses with a finance org identified as an academic department  
 Schools not shown in chart: Interdisciplinary & UNC Exchange



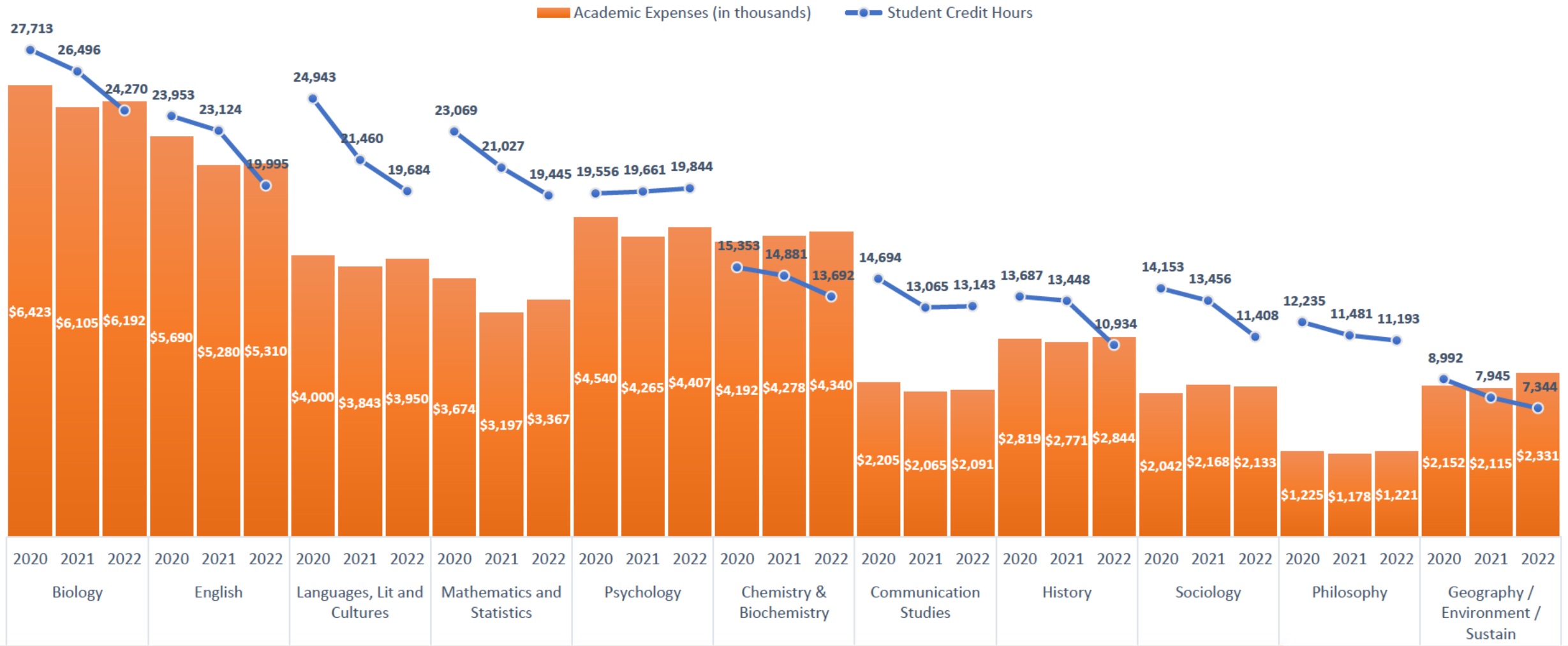
# Colleges & Schools – Student Credit Hours and Academic Net Revenue



Academic Net Revenue is calculated with state appropriation  
 Schools not shown in chart: Interdisciplinary & UNC Exchange

# College of Arts and Sciences

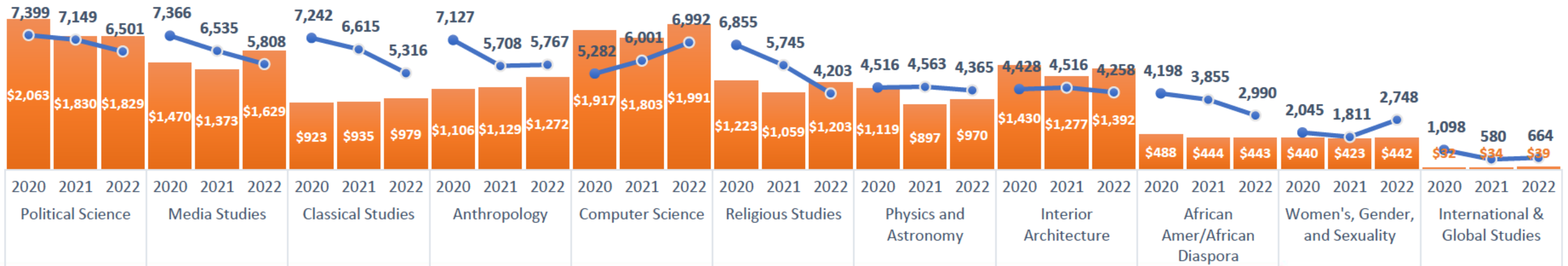
# College of Arts and Sciences – Student Credit Hours and Academic Expenses (1/2)



Departments not shown in charts: Associate Dean Programs, Freshmen Seminars, and Special Programs

# College of Arts and Sciences – Student Credit Hours and Academic Expenses (2/2)

Academic Expenses (in thousands)    Student Credit Hours

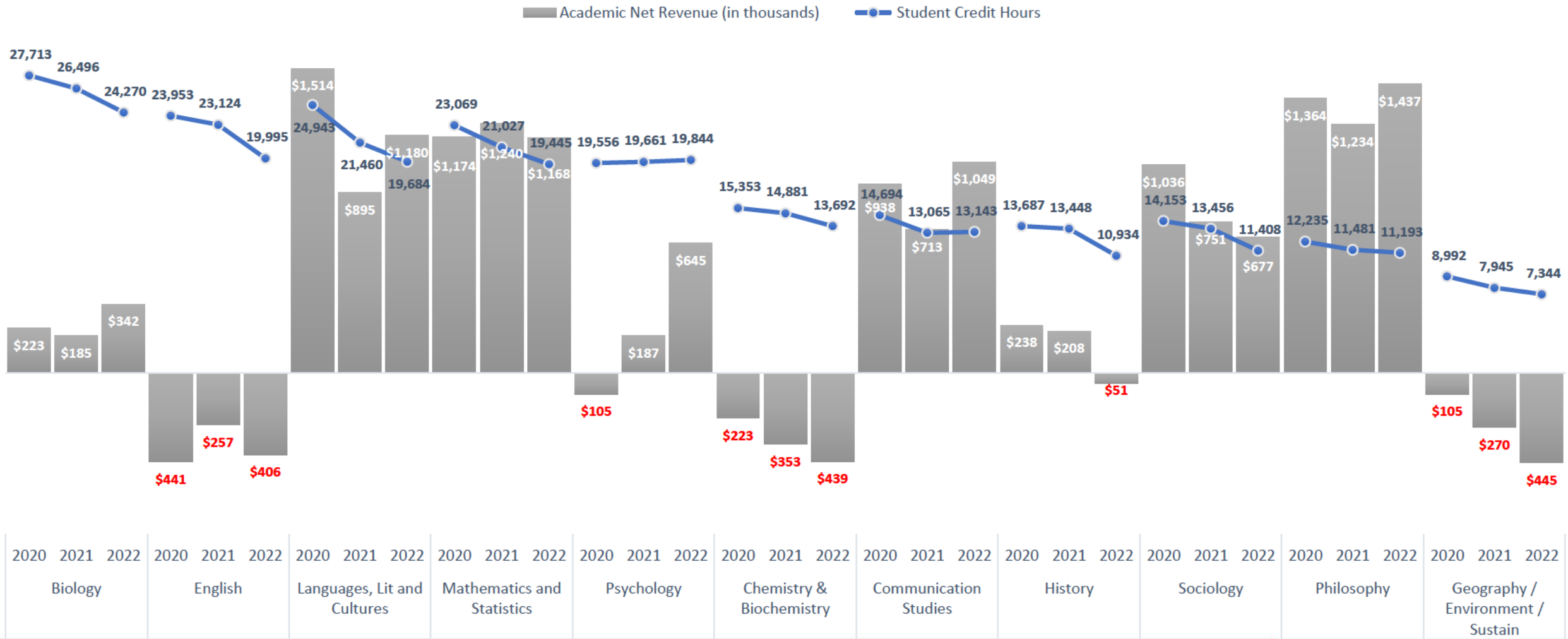


Departments not shown in charts: Associate Dean Programs, Freshmen Seminars, and Special Programs

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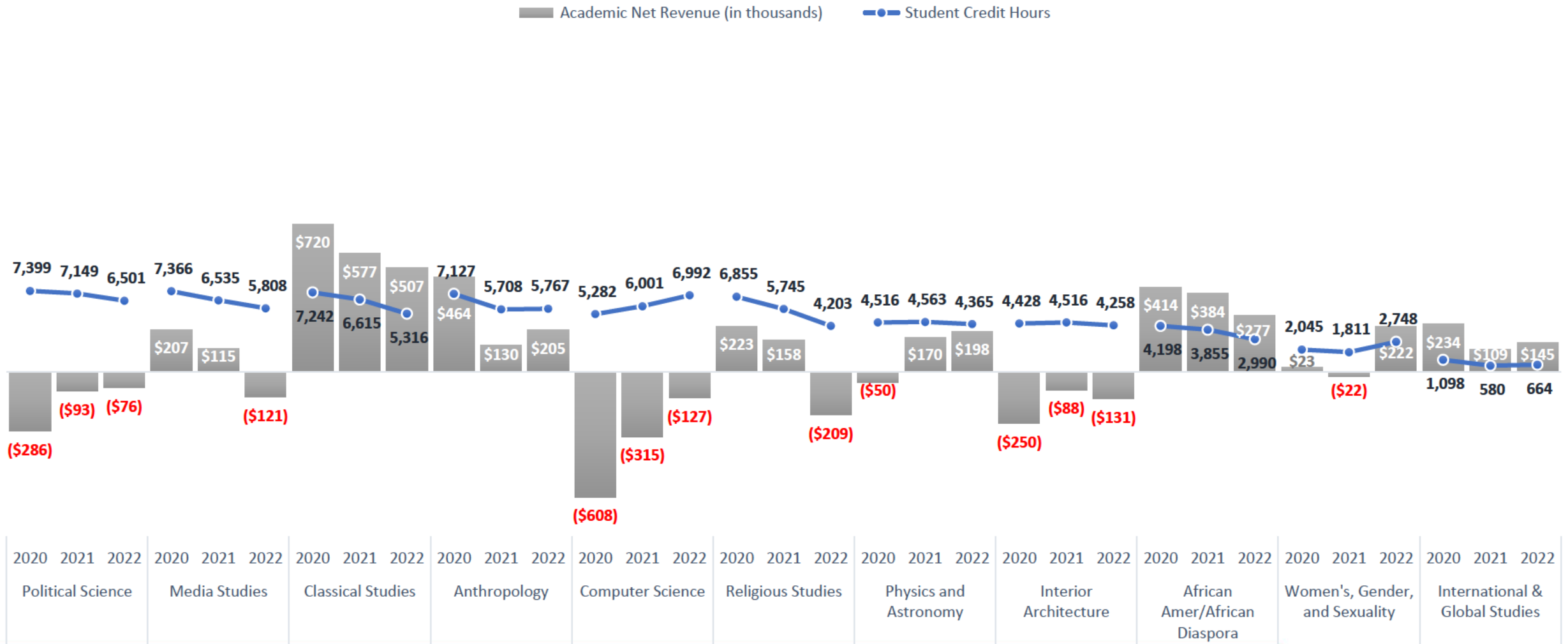
rpk GROUP. All rights reserved.

# College of Arts and Sciences – Student Credit Hours and Academic Net Revenue (1/2)



Academic Net Revenue is calculated with state appropriation  
 Departments not shown in charts: Associate Dean Programs, Freshmen Seminars, and Special Programs.

# College of Arts and Sciences – Student Credit Hours and Academic Net Revenue (2/2)

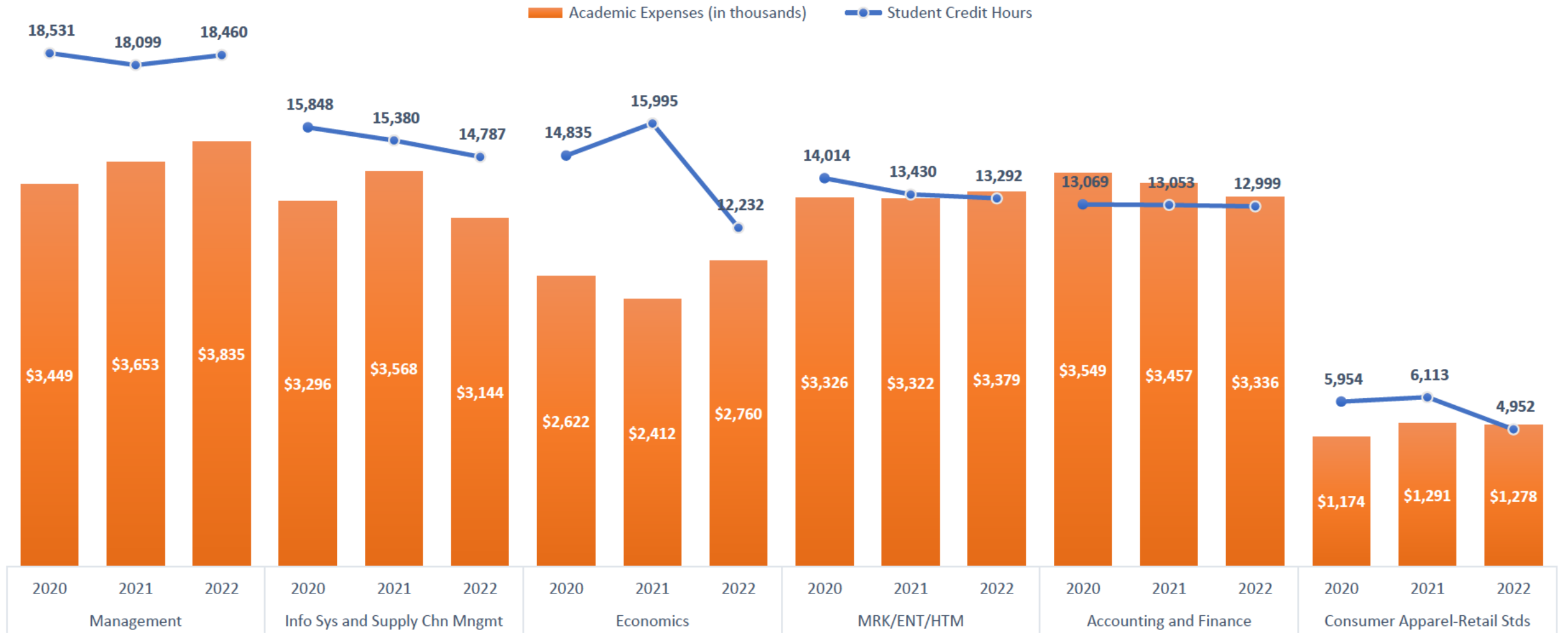


Academic Net Revenue is calculated with state appropriation  
 Departments not shown in charts: Associate Dean Programs, Freshmen Seminars, and Special Programs



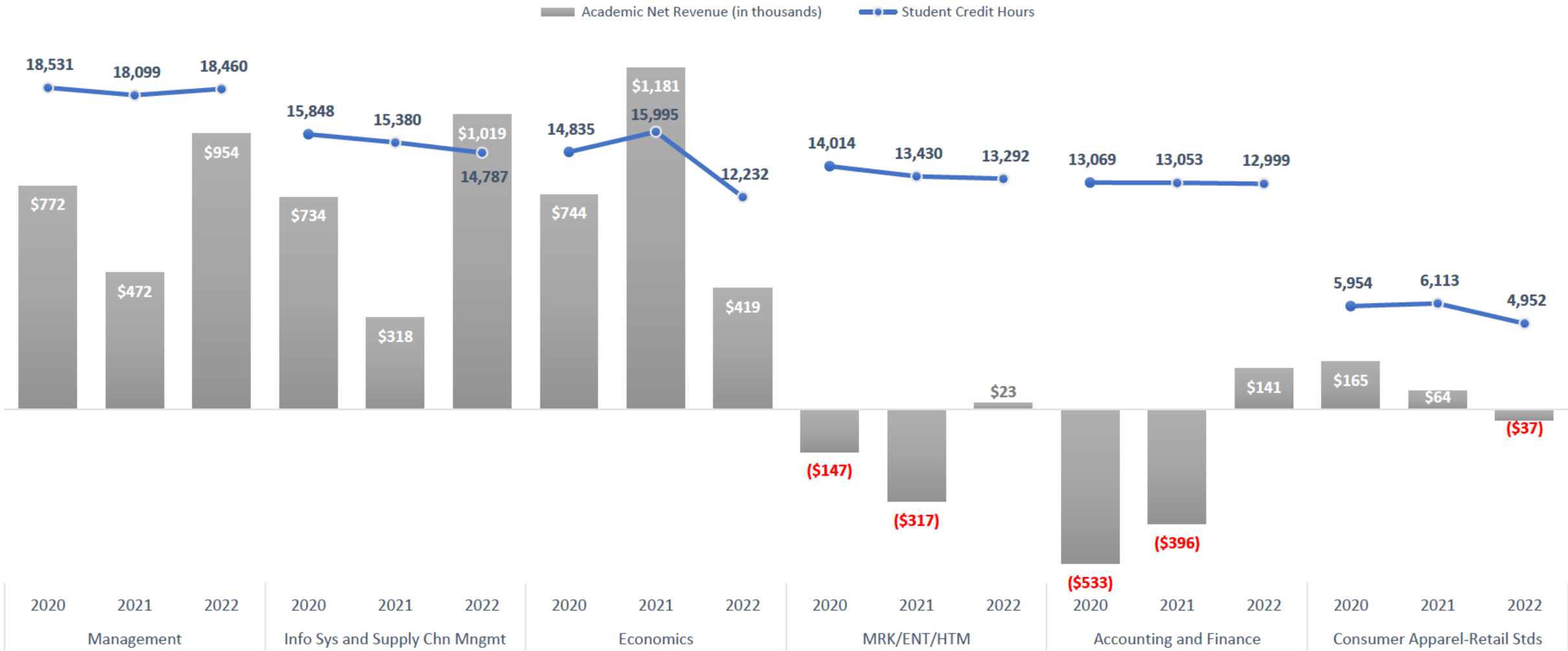
# School of Business and Economics

# Sch of Business of Economics – Student Credit Hours and Academic Expenses



Department not shown in charts: Dean's Office - BE

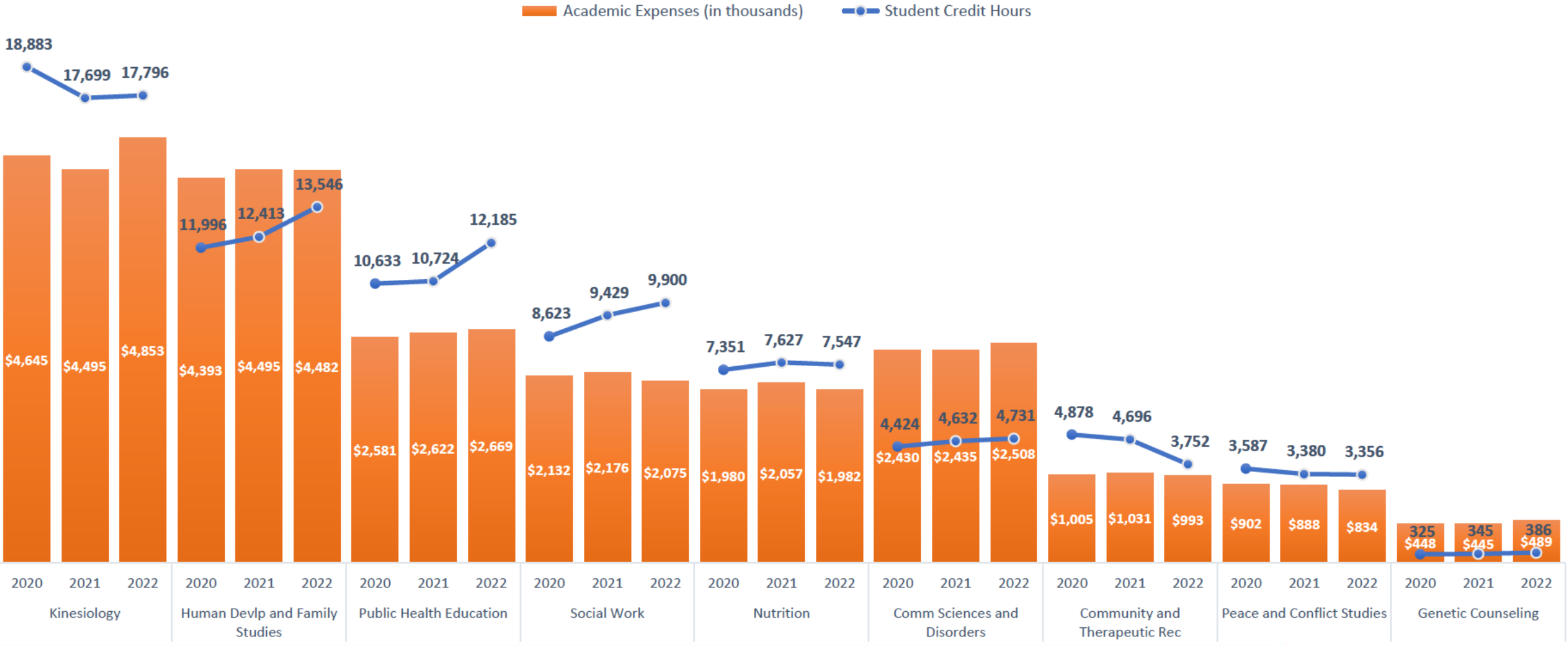
# Sch of Business of Economics – Student Credit Hours and Academic Net Revenue



Academic Net Revenue is calculated with state appropriation  
 Department not shown in charts: Dean's Office - BE

# Health and Human Sciences

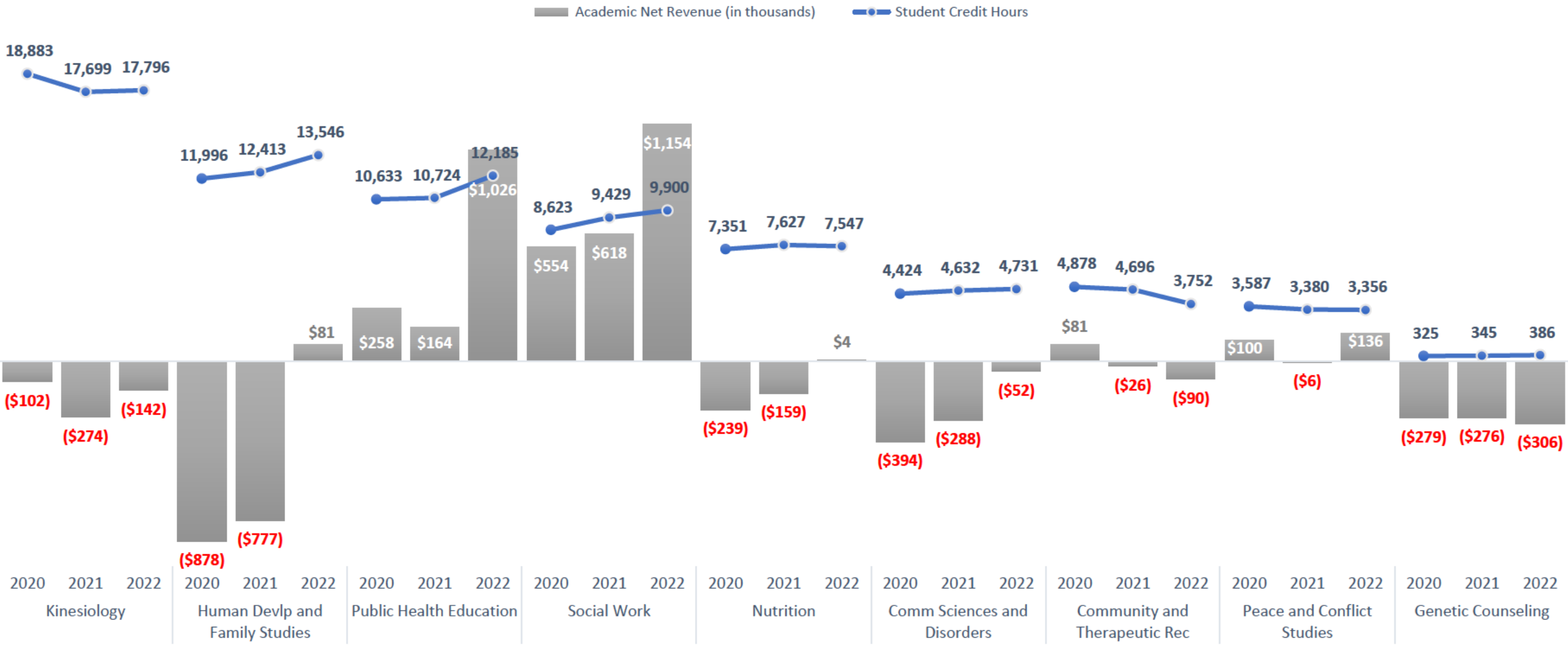
# Health and Human Sciences - Student Credit Hours and Academic Expenses



Department not shown in charts: Dean's Office - HH



# Health and Human Sciences - Student Credit Hours and Academic Net Revenue

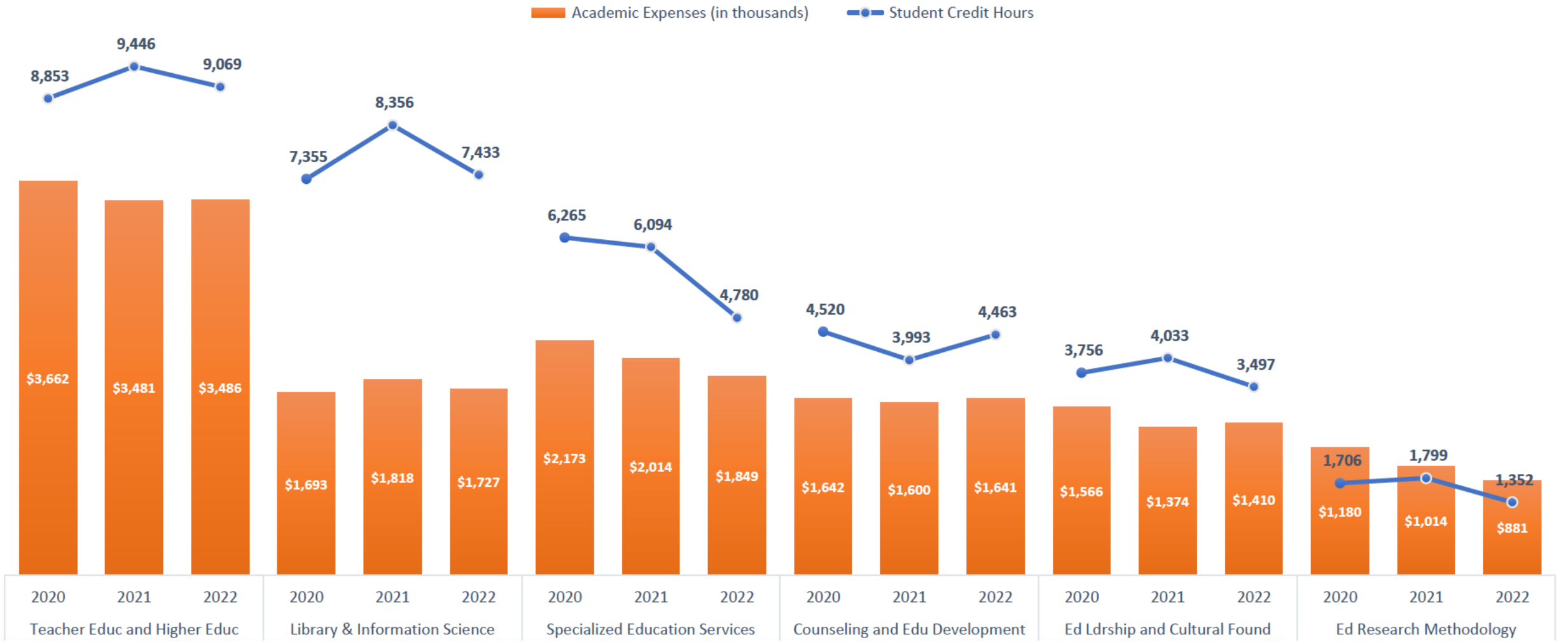


Academic Net Revenue is calculated with state appropriation  
 Department not shown in charts: Dean's Office - HH

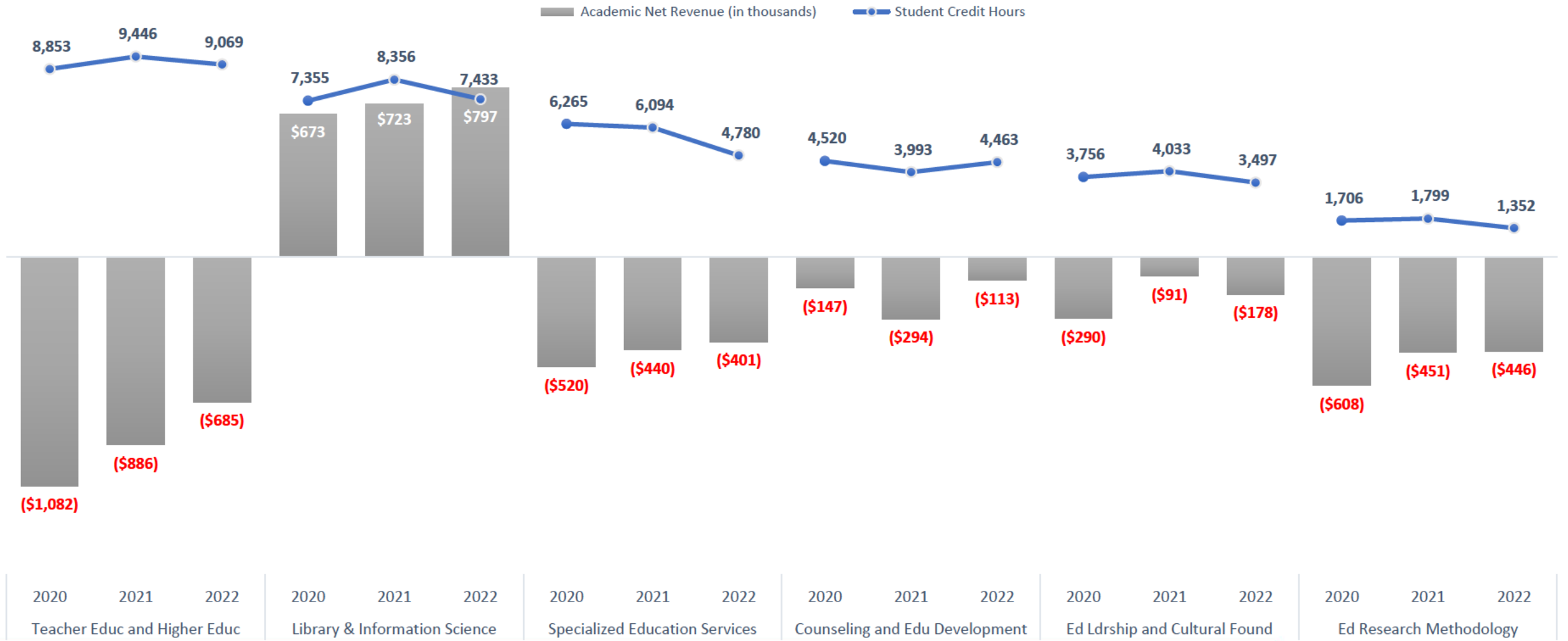


# School of Education

# School of Education – Student Credit Hours and Academic Expenses



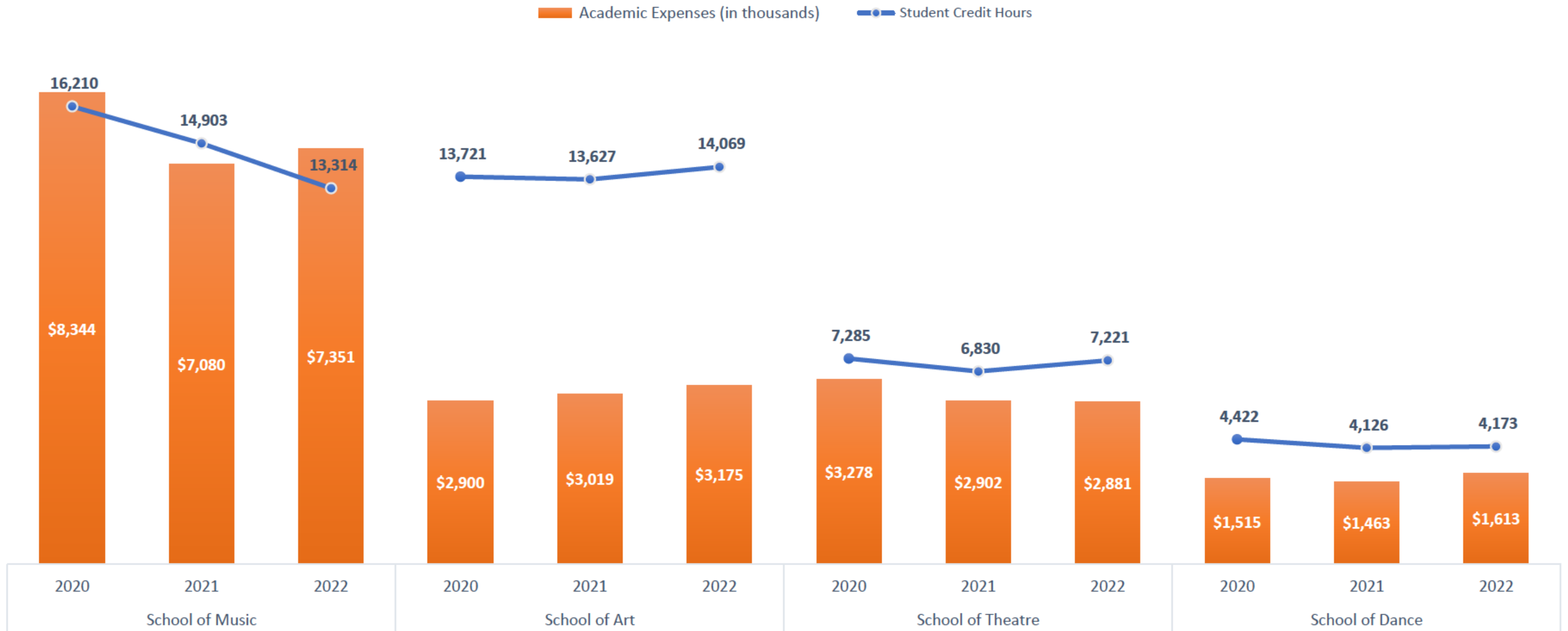
# School of Education – Student Credit Hours and Academic Net Revenue



Academic Net Revenue is calculated with state appropriation

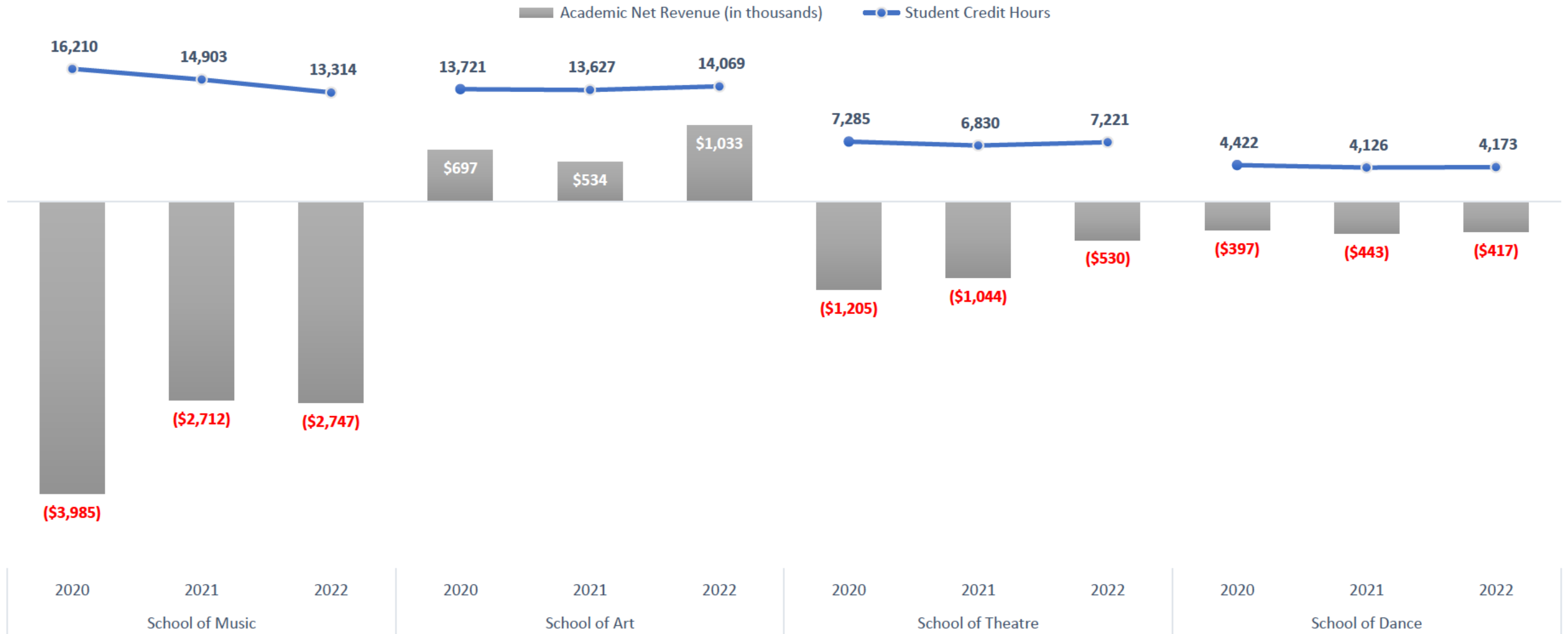
# College Visual/Performing Arts

# College Visual/Performing Arts – Student Credit Hours and Academic Expenses



Department not shown in charts: Dean's Office - VP

# College Visual/Performing Arts – Student Credit Hours and Academic Net Revenue 25



Academic Net Revenue is calculated with state appropriation  
 Department not shown in charts: Dean's Office - VP



# Thank you

Katie Hagan, Principal  
Mike Daly, Sr. Associate  
Raven Moody, Sr. Analyst

**University of North Carolina Greensboro  
Human Resources Analyses to Support Administrative Cost Savings  
July 18, 2023**

**Background**

University of North Carolina Greensboro (UNCG) partnered with rpk GROUP (rpk) for a comprehensive project to develop a framework and database for academic portfolio and resource evaluation, as well as to support analyses to lead to administrative cost savings. To support UNCG’s efforts to identify administrative cost savings, Katie Hagan from rpk participated in the Chancellor’s Task Force on Financial Sustainability, and rpk fielded a feedback survey to surface ideas for the Task Force and provided feedback and guidance throughout the Task Force meetings as recommendations emerged. One of the key recommendations of the Task Force was to take a closer look at the staffing levels at UNCG, ideally with the goal of achieving financial savings over time through strategic staffing reorganization. This memo captures additional analyses provided by rpk and makes more specific recommendations as to how UNCG can begin working towards strategic reorganization and alignment of staffing to the reduced student population that UNCG now serves.

The recommendations below are informed by a review of the current organizational structure and staffing levels. The data used were 2023 organizational charts as well as a July 2023 all employee report. In addition to quantitative and personnel data, rpk reviewed the results of the campus survey that was fielded in support of the Task Force, and drew upon the firm’s experiences working with UNCG for the last eight months.

**Recommendations**

The recommendations from rpk are as follows:

1. Shared Services - Implement a shared services model for administrative support staff, focusing initially on academic affairs.
2. Restructure of Key Functions - Redesign of business officer, marketing and communications, and facilities functions and roles to achieve efficiency.
3. Spans and Layers - Monitor UNCG institutional span of control and increase the span over time.

*1. Shared Services Approach to Admin Support Roles*

Within the education sector nationally, there is a move to create, redesign and expand shared services models. These models provide greater efficiency and reduced cost, while maintaining or enhancing service delivery. Standardizing and optimizing processes and workflow are essential components of shared services’ success. The streamlined workflow will support an emphasis on continuous business process improvement through automation, process expertise, and data analysis. We believe that shared services can offer a more effective and efficient approach to service delivery for administrative support across UNCG, improving service provider-client relationships and focusing on accountability. A potential option to explore is to first pilot this approach in Academic Affairs, then spread that approach across the institution over time.

*Table 1: Admin Support Roles Compared to All Employees Across UNCG*

	<b>Admin Support FTE</b>	<b>Total Employees*</b>
Academic Affairs	80	754
Chancellor	1	56
Enrollment Management	5	95



Finance and Administration	25	488
Information Technology Services	2	142
Intercollegiate Athletics	1	77
Research and Engagement	1	235
Student Affairs	15	279
University Advancement	6	64

*\*Faculty, temporary staff, and student workers are not captured in total employees; total employees do include funded vacancies*

Across the Academic Affairs division, there are a total of 80 administrative support full-time equivalents (FTEs) to support a division of 754 employees. The administrative support staff are spread out across all departments, with departments having between one and three individuals in those roles. This ratio of administrative support to other employees is one of the lowest across all divisions and points to an opportunity to better manage that investment in administrative support.

Delivery of administrative support services could be made more efficient by having personnel work across departments in a shared service model. A shared service model of this kind would improve service, allowing staff to be flexible and respond to shifting priorities, while ultimately reducing staff over time through natural attrition and workload efficiencies. A shared service model also provides opportunities for individuals to gain new or different experiences and opportunities for professional growth as they support multiple units.

2. Organizational Structure Redesign Opportunities

Simplifying the organization structure across various departments aims to increase the flow of ideas and decisions and streamline workflow across each team and down into the institution while also reducing costs. Based on a review of the 2023 organizational charts across all of UNCG, and confirmed by the June 2023 all employee data, below are opportunities for improved functional alignment and potential efficiencies if backfilling some of these roles is managed strategically:

- a. **Business Officers:** There are 33 business managers, business officers, and business services coordinators within academic affairs, and an additional 27 spread across the rest of the institution. These roles are critical for financial management, but this level of decentralization in a financial role can create challenges for the university. Specifically, if not managed very carefully, units will operate independent of one another and create unique and inconsistent business processes. rpk saw this firsthand when working with academic affairs to understand the cost of departmental operations – different colleges had different practices when it came to booking particular expenses, which made an apples-to-apples comparison challenging and manual to create. UNCG should determine if this level of decentralized financial support for units is desirable and strategic. If it is not, efforts should be made to create a more centralized pool of financial support personnel, reporting up through the Vice Chancellor for Finance and Administration. Following administrative support, this function is the clearest area of opportunity for shared services for UNCG.
- b. **Marketing and Communication Roles:** While there is a central marketing and communications staff that serves the university, a few other units operate their own teams of marketing and communication support, such as advancement, athletics, housing and residence life, campus activities and programs, enrollment management, the school of nursing, and the office of research and engagement. Like the decentralized business function above, UNCG should assess whether maintaining duplicative and decentralized marketing and communication roles supports the institution in achieving the ideal level of marketing and communication support. This level of decentralization could hinder consistency in branding and messaging. UNCG should determine whether

resources could be reclaimed centrally to serve the entire university community more effectively, reporting up through the Vice Chancellor for Strategic Communication.

- c. **Facilities:** UNCG has a robust facilities staff with some specialization – most notably an in-house architect and at least seven in-house engineers. UNCG also operates two different facilities staffs, one within finance and administration, and another within student affairs. Collectively, UNCG has more than 250 employees supporting the maintenance and upkeep of the buildings and grounds. This is a significant investment. UNCG should do its due diligence and ensure this level of investment is in line with industry standards.

### 3. Monitor UNCG Span of Control and Increase Over Time

Span of control refers to the number of direct reports a manager supervises. Over time, complexity creeps into institutions and layers accumulate, increasing the distance between leadership and the front line. Higher education benchmarks include average spans of 6–7 for expertise-based functions and average spans of 11–13 for task-based functions.

Creating higher spans drives effectiveness (higher value) by:

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The data used to calculate spans and layers savings for UNCG was submitted in June 2023. The data includes budgeted vacancies. The data also excludes faculty (but includes deans, directors, and coordinators), student workers, and temporary employees.

*Table 2: Spans and Layers Analysis of UNCG, July 2023*

Division	Supervisors	Total Employees	Span of Control
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Information Technology Services	22	142	6.4
Intercollegiate Athletics	25	77	3.1
Research and Engagement	52	235	4.5
Student Affairs	73	279	3.8
University Advancement	22	64	2.9
	590	2,189	3.7

UNCG operates at a span of control of four – meaning that, across the institution, the average supervisor oversees four direct reports. However, this varies widely by division and within departments. UNCG should monitor this metric as part of the effort to strategically realign staffing plans in response to lower student enrollment and identify opportunities to reduce managerial structures and increase spans of control for appropriate functions.

Based on a review of organizational charts at UNCG and confirmed in the review of the June 2023 all employee report, the following areas stood out as having many managers or leaders (based on title), and relatively few direct reports:

1. Academic Achievement Center – one senior assistant director and four assistant directors, with only two support staff
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UNCG has invested considerable time and energy into assessing its resource allocations (people, time and money) and opportunities to maintain or enhance services while reducing costs. Achieving those opportunities will largely impact positions at UNCG. The review summarized above provides a roadmap and a set of tools that UNCG can use to design a new organization structure and the path to achieve that structure. This includes a move to shared services models and an ongoing review of spans and layers.

It will be important to separate the desired end state from the process and timing for implementing that end state. Meaning, UNCG can elect to move toward a new organization structure and related efficiencies more organically as vacancies emerge, or it can move more quickly to reallocate resources. These two approaches reflect a tradeoff between speed and the capture of cost savings.

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Project Leaders Meeting Agenda & Materials  
**Date:** Tuesday, July 18, 2023 2:58:21 PM  
**Attachments:** [Outlook-vxce5ir3.png](#)  
[UNCG Academic Cost and Revenue Analysis Public Table 7.18.23.xlsx](#)

---

Hi and Bob,

To save your eyes I've attached an alternative view of the Academic Department Financial Analysis Table.

Thanks again,  
Mike Daly  
rpk GROUP

---

**From:** Mike Daly  
**Sent:** Tuesday, July 18, 2023 2:31 PM  
**To:** Bob Shea  
**Cc:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Subject:** UNCG/rpk Project Leaders Meeting Agenda & Materials

Hi and Bob,

Katie and I are looking forward to our check-in tomorrow. We'd like to focus the conversation on these topics:

- Academic Department Financial Analysis Deck - attached
  - In addition to establishing methodology, this slide deck provides a focused view of the departments within Colleges & Schools; showing student credit hours, expenses, and net revenue.
- Academic Department Financial Analysis Table - attached (recommend downloading for optimal viewing)
- Response to the Market/Demand program analysis
  - rpk will issue an addendum to its narrative report that removes the recommendation of mental health counseling as an opportunity for UNCG. The PRTF is correct in noting that there are limitations in understanding degree to career trajectory in using the federal government's established CIP-SOC crosswalk as mapped to labor projections. With respect to the diversity of UNCG's portfolio and how a combination of other sources (College Scorecard, UNC System Office, U.S. Department of Education's CIP-SOC crosswalk, U.S. Department of Labor/North Carolina Department of Labor, etc.) could be considered, we would recommend that UNCG create a working group in coordination with IR to establish the data sources that can be regularly used to track career/degree outcomes of graduates. Until work is completed, we recommend removing labor-related outcomes from the PRTF's rubric.
- Administrative Services Review update - draft attached



Katie will walk through the recommendations tomorrow. Please note that it's still a draft and Katie is waiting to meet with [redacted] for final approval of the numbers.

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#);  
**Cc:** [Mike Daly](#)  
**Subject:** Memo - word doc  
**Date:** Wednesday, July 19, 2023 8:59:10 AM  
**Attachments:** [UNCG HR Analyses Summary Memo\\_DRAFT\\_7.18.23.docx](#)

---

Hi Bob and ,

Thanks for the good conversation this morning. Attached is the memo as a word document for your ease of providing feedback.

Best,  
Katie

**rp**k GROUP  
from mission to market

Katie Hagan | Principal | [rp](#)k GROUP

626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490

**University of North Carolina Greensboro**  
**Human Resources Analyses to Support Administrative Cost Savings**  
**July 18, 2023**

**Background**

University of North Carolina Greensboro (UNCG) partnered with rpk GROUP (rpk) for a comprehensive project to develop a framework and database for academic portfolio and resource evaluation, as well as to support analyses to lead to administrative cost savings. To support UNCG’s efforts to identify administrative cost savings, Katie Hagan from rpk participated in the Chancellor’s Task Force on Financial Sustainability, and rpk fielded a feedback survey to surface ideas for the Task Force and provided feedback and guidance throughout the Task Force meetings as recommendations emerged. One of the key recommendations of the Task Force was to take a closer look at the staffing levels at UNCG, ideally with the goal of achieving financial savings over time through strategic staffing reorganization. This memo captures additional analyses provided by rpk and makes more specific recommendations as to how UNCG can begin working towards strategic reorganization and alignment of staffing to the reduced student population that UNCG now serves.

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**From:** [Mike Daly](#)  
**To:**  
**Cc:** [Bob Shea](#); [Katie Hagan](#)  
**Subject:** UNCG/rpk - Financial Analysis Next Steps  
**Date:** Wednesday, July 19, 2023 1:10:26 PM  
**Attachments:** [Outlook-t2vcuij2.png](#)

---

Hi

Katie and I had a chance to debrief our conversation with you this morning. Rather than make immediate changes to the visuals in the presentation, I'm going to schedule time with as soon as possible to discuss the best scenario for a strategic roll-out of the financial information. Our goal is to ensure we are providing an opportunity for Deans and Department Chairs to understand the data and take appropriate action.

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
mdaly@rpkgroup.com | Cell: 518-796-2209

**From:**  
**To:** [Mike Daly](#)  
**Cc:** [Bob Shea](#); [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk - Financial Analysis Next Steps  
**Date:** Wednesday, July 19, 2023 1:17:58 PM  
**Attachments:** [Outlook-t2vcuij2.png](#)

---

Mike,  
The July 26 2:30 in NIB 120 session is what I'm referring to!

---

**From:**  
**Sent:** Wednesday, July 19, 2023 1:11:57 PM  
**To:** Mike Daly <mdaly@rpkgroup.com>  
**Cc:** Bob Shea ; Katie Hagan <khagan@rpkgroup.com>  
**Subject:** Re: UNCG/rpk - Financial Analysis Next Steps

Okay, can this be included at the deans workshop?

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---

**From:** Mike Daly <mdaly@rpkgroup.com>  
**Sent:** Wednesday, July 19, 2023 1:10:17 PM  
**To:**  
**Cc:** Bob Shea ; Katie Hagan <khagan@rpkgroup.com>  
**Subject:** UNCG/rpk - Financial Analysis Next Steps

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**To:**  
**Cc:** [Bob Shea](#); [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk - Financial Analysis Next Steps  
**Date:** Wednesday, July 19, 2023 2:27:09 PM  
**Attachments:** [Outlook-t2vcuij2.png](#)

---

Thanks, I'll let you know of potential next steps after , Raven, and I talk tomorrow.

More soon,  
Mike DALY  
rpk GROUP

---

**From:**  
**Sent:** Wednesday, July 19, 2023 1:17 PM  
**To:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Cc:** Bob Shea ; Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Subject:** Re: UNCG/rpk - Financial Analysis Next Steps

Mike,  
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---

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**To:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Cc:** Bob Shea ; Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
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**Subject:** UNCG/rpk - Financial Analysis Next Steps

Hi

Katie and I had a chance to debrief our conversation with you this morning. Rather than make immediate changes to the visuals in the presentation, I'm going to schedule time with as soon as possible to discuss the best scenario for a strategic roll-out of the financial information. Our goal is to ensure we are providing an opportunity for Deans and Department Chairs to understand the data and take appropriate action.

Thanks again,

Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

**From:**  
**To:** [Mike Daly](#)  
**Cc:** [Bob Shea](#); [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk - Financial Analysis Next Steps  
**Date:** Wednesday, July 19, 2023 1:12:02 PM  
**Attachments:** [Outlook-t2vcuij2.png](#)

---

Okay, can this be included at the deans workshop?

Get [Outlook for iOS](#)

---

**From:** Mike Daly <mdaly@rpkgroup.com>  
**Sent:** Wednesday, July 19, 2023 1:10:17 PM  
**To:**  
**Cc:** Bob Shea ; Katie Hagan <khagan@rpkgroup.com>  
**Subject:** UNCG/rpk - Financial Analysis Next Steps

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626C Admiral Drive, Suite 511, Annapolis, MD 21401  
mdaly@rpkgroup.com | Cell: 518-796-2209

**From:**  
**To:** [Katie Hagan](#); [Bob Shea](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Memo - word doc  
**Date:** Wednesday, July 19, 2023 3:39:56 PM  
**Attachments:** [UNCG HR Analyses Summary Memo\\_DRAFT\\_7.18.23](#) [\).docx](#)

---

Katie and Mike  
See attached document with and my edits.  
Hope this is helpful.

University of North Carolina Greensboro  
Greensboro, NC 27412

---

**From:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Sent:** Wednesday, July 19, 2023 8:58 AM  
**To:** Bob Shea  
**Cc:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Subject:** Memo - word doc

Hi Bob and ,

Thanks for the good conversation this morning. Attached is the memo as a word document for your ease of providing feedback.

Best,  
Katie

**rp**k GROUP  
from mission to market

Katie Hagan | Principal | [rp](#)k GROUP  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com) | 757-589-0490



**From:** [Katie Hagan](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Memo - word doc  
**Date:** Wednesday, July 19, 2023 3:43:47 PM

---

Thanks, ! I am not comfortable with edit related to the task force, but the rest look fine.

---

**From:**  
**Sent:** Wednesday, July 19, 2023 3:39 PM  
**To:** Katie Hagan <khagan@rpkgroup.com>; Bob Shea  
**Cc:** Mike Daly <mdaly@rpkgroup.com>  
**Subject:** Re: Memo - word doc

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khagan@rpkgroup.com | 757-589-0490

**From:** [Mike Daly](#)  
**To:**  
**Cc:** [Bob Shea](#);  
**Subject:** UNCG/rpk Department Financial Data  
**Date:** Thursday, July 20, 2023 4:22:48 PM  
**Attachments:** [Outlook-gmztlu4o.png](#)

---

Hi

Raven, and I had a great conversation today regarding the best format to share department-level financial data with academic deans. We've settled on a version of the table that we shared with you and Bob earlier this week. We'll update that table with information regarding methodology and definitions. Providing the deans with the numbers, rather than multiple visuals of numbers (as the Powerpoint was trending toward) should allow their focus to remain steady.

I would recommend that the table shows only student credit hours, tuition & fees, personnel expenses, and non-personnel expenses. This provides clarity into revenues directly produced by units (tuition and fees driven by SCH) and the expenses for those units. By removing allocated state appropriations and academic net revenue we're focusing on the financial elements that Deans/Chairs have the most control over.

Appreciate your insights and reactions,

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
mdaly@rpkgroup.com | Cell: 518-796-2209

**From:**  
**To:** [Mike Daly](#)  
**Cc:** [Bob Shea](#); ; [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Department Financial Data  
**Date:** Thursday, July 20, 2023 4:54:37 PM  
**Attachments:** [Outlook-gmztlu4o.png](#)

---

Hi all,

The recommendation is not one I agree with Mike. I need us to include state appropriations and academic net revenue for reasons we've discussed.

Thank you,

University of North Carolina Greensboro

Greensboro, NC 27412

---

**From:** Mike Daly <mdaly@rpkgroup.com>  
**Sent:** Thursday, July 20, 2023 4:22 PM  
**To:**  
**Cc:** Bob Shea  
**Subject:** UNCG/rpk Department Financial Data

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mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Mike Daly](#)  
**To:**  
**Cc:** [Bob Shea](#); ; [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Department Financial Data  
**Date:** Friday, July 21, 2023 9:21:15 AM  
**Attachments:** [Outlook-gmztlu4o.png](#)

---

Thanks, . I appreciate the direct feedback.

We anticipate sharing the revised tables with you all on Monday in preparation for sharing them with Academic Deans on Wednesday.

Thanks again,  
Mike Daly  
rpk GROUP

---

**From:**  
**Sent:** Thursday, July 20, 2023 4:54 PM  
**To:** Mike Daly <mdaly@rpkgroup.com>  
**Cc:** Bob Shea ; Katie Hagan  
<khagan@rpkgroup.com>  
**Subject:** Re: UNCG/rpk Department Financial Data

Hi all,

The recommendation is not one I agree with Mike. I need us to include state appropriations and academic net revenue for reasons we've discussed.

Thank you,

University of North Carolina Greensboro  
Greensboro, NC 27412

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**From:** Mike Daly <mdaly@rpkgroup.com>  
**Sent:** Thursday, July 20, 2023 4:22 PM



**To:****Cc:** Bob Shea <r\_shea@uncg.edu>;**Subject:** UNCG/rpk Department Financial Data

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Michael Daly | Senior Associate | [rpk GROUP](#)

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mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Project Update and Financial Tables  
**Date:** Monday, July 24, 2023 12:52:07 PM  
**Attachments:** [Outlook-r3ctg5rn.png](#)  
[UNCG Academic Cost and Revenue Analysis Public Table 7.20.23.xlsx](#)  
[UNCG Weekly Project Update 2023.07.24.pdf](#)

---

Hi [redacted] and Bob,

Attached is the weekly project update tracker for your review. I held on sharing it today to ensure that these updates were present:

- Katie met with [redacted] on Friday and finalized the HR data in the draft ASR report shared earlier. Katie will share a final report with you this week.
- The rpk team is meeting with [redacted] on Thursday to review her questions regarding the approach to the market analysis. That conversation will further inform how we structure an appropriate response to issues raised by the Provost's Portfolio Review Taskforce.
- Department-level data tables have been created and attached to this email.
  - Please confirm that you'd like rpk/Mike to show this to the Academic Deans on 7/26.

Thanks again,  
Mike Daly

**rpk** GROUP

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Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209



# UNCG & rpk GROUP

## Status Report: July 24, 2023

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# Project Overview: July 14 – July 21

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>• Provided introduction to dashboards to Provost's Portfolio Review Taskforce (7/19).</li> <li>• Provided introduction to dashboards to UNCG/rpk Data Team (7/20).</li> <li>• Updated Academic Net Revenue tables with department-level data trends for sharing with Academic Deans.</li> <li>• Shared draft ASR HR analyses with project leaders; Katie finalized HR data with (7/21).</li> </ul>	<ul style="list-style-type: none"> <li>• Scheduling meeting with to review approach to Market Demand analysis and answer question. This conversation will provide critical direction for rpk's response to concerns raised in memo from Provost's Portfolio Review Taskforce.</li> <li>• Providing introduction to dashboards and facilitated training for Academic Deans (7/26).</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>• Provided introduction to dashboards to Provost's Portfolio Review Taskforce (7/19).</li> <li>• Confirmed that data table supporting Academic Net Revenue should be shared with Academic Deans during training on 7/26.</li> <li>• Confirmed HR data in ASR report.</li> </ul>	<ul style="list-style-type: none"> <li>• Providing introduction to dashboards and facilitated training for Academic Deans (7/26).</li> <li>• Finalizing access permissions for stakeholder groups to use dashboards.</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete														
Dashboard Development																On Track	On Track	On Track	On Track	On Track	On Track	On Track	At Risk	Complete	Complete	Complete	Complete	Complete	Complete		
Dashboards Shared with Deans																						Off Track	Off Track	Off Track	Off Track	Not Started	Not Started	On Track	On Track	On Track	
Dashboards Shared with Chairs																						Off Track	Off Track	Off Track	Off Track	Not Started	Not Started	Not Started	Not Started	Not Started	
Dashboards Shared with Taskforce																								Off Track	Off Track	On Track	On Track	Complete	Complete		
Faculty Workshops										Complete	Complete	On Track	On Track	On Track	On Track	On Track	On Track	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	Not Started	Not Started	Not Started	Not Started	Not Started	

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May				June				July					
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk														
Final Report & Recommendations																				Complete	Complete	Complete	At Risk	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Dashboard Training for Academic Deans	[redacted] and Mike Daly	7/26; 2:30pm	
UNCG/rpk Market Demand Analysis	rpk and [redacted]	7/27; TBD	

# Revised Timeline – Academic Data/Dashboard

Data	All Data Collected	Definitions and Methodology Confirmed	Data Validated	Beta Dashboard Launch and Feedback Period	Beta Dashboard Refined Based on Feedback
Academic Program List	3/24	4/18	4/27	6/12 – 6/30	7/3-8/1
Academic Structure	4/7	4/21	N/A		
Course Data	3/24	4/13	4/21		
Instructor Data	3/31	5/4	5/5		
Faculty Data	4/14	5/4	5/5		
Academic Program Data*	4/14	4/28	6/6		
Finance Data	3/24	5/19	5/26	N/A	N/A

Key	Complete	On Track	At Risk	Off Track	Not Started

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from mission to market

# Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Project Update and Financial Tables  
**Date:** Tuesday, July 25, 2023 4:51:30 PM  
**Attachments:** [Outlook-r3ctq5rn.png](#)

---

Hi

Just checking in regarding my showing the financial data tables with Academic Deans tomorrow - I don't want to get ahead of any plans you and your team have for sharing this information.

Thanks again,  
Mike Daly  
rpk GROUP

---

**From:** Mike Daly  
**Sent:** Monday, July 24, 2023 12:51 PM  
**To:** Bob Shea  
**Cc:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Subject:** UNCG/rpk Weekly Project Update and Financial Tables

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**From:**  
**To:** [Mike Daly](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Project Update and Financial Tables  
**Date:** Tuesday, July 25, 2023 6:51:00 PM  
**Attachments:** [Outlook-r3ctg5rn.png](#)

---

Hi Mike,  
Yes, please share with deans tomorrow.  
I plan to attend. Thank for checking!

---

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**Sent:** Tuesday, July 25, 2023 4:51 PM  
**To:** Bob Shea  
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**University of North Carolina Greensboro**  
**Human Resources Analyses to Support Administrative Cost Savings**  
**July 27, 2023**

### **Background**

University of North Carolina Greensboro (UNCG) partnered with rpk GROUP (rpk) for a comprehensive project to develop a framework and database for academic portfolio and resource evaluation, as well as to support analyses to lead to administrative cost savings. To support UNCG's efforts to identify administrative cost savings, Katie Hagan from rpk participated in the Chancellor's Task Force on Financial Sustainability, and rpk fielded a feedback survey to surface ideas for the Task Force and provided feedback and guidance throughout the Task Force meetings as recommendations emerged. One of the key recommendations of the Task Force was to take a closer look at the staffing levels at UNCG, ideally with the goal of achieving financial savings over time through strategic staffing reorganization. This memo captures additional analyses provided by rpk and makes more specific recommendations as to how UNCG can begin working towards strategic reorganization and alignment of staffing to the reduced student population that UNCG now serves.

The recommendations below are informed by a review of the current organizational structure and staffing levels. The data used were 2023 organizational charts as well as a July 2023 all employee report. In addition to quantitative and personnel data, rpk reviewed the results of the campus survey that was fielded in support of the Task Force, and drew upon the firm's experiences working with UNCG for the last eight months.

### **Recommendations**

The recommendations from rpk are as follows:

1. Shared Services - Implement a shared services model for administrative support staff, focusing initially on academic affairs.
2. Restructure of Key Functions - Redesign of business officer, marketing and communications, and facilities functions and roles to achieve efficiency.
3. Spans and Layers - Monitor UNCG institutional span of control and increase the span over time.

#### **1. Shared Services Approach to Administrative Support Functions**

Within the education sector nationally, there is a move to create, redesign and expand shared services models. These models provide greater efficiency and reduced cost, while aiming to maintain and more equitably distribute service delivery. Standardizing and optimizing processes and workflow are essential components of shared services' success. The streamlined workflow will support an emphasis on continuous business process improvement through automation, process expertise, and data analysis. Shared services can offer a more effective and efficient approach to service delivery for administrative support functions, such as business processes, human resources processes, and scheduling. Meaning, instead of every unit having their own business officer and administrative assistant, a central unit is created that would provide the services typically performed by those roles and existing personnel move into that shared unit. This central unit would then organize into administrative functions, shifting the role of the administrative assistant or business officer from needing to be knowledgeable about all HR, finance, and operational functions, to creating more specialization in those support roles. These central functions operate with clear service agreements with the units that use their support, and have reporting relationships with the central office functions for which they are aligned (HR and finance) to ensure accuracy and consistency in workflows and processes.

We recommend that UNCG pilot this approach in Academic Affairs, then spread that approach across the institution over time if successful.

*Table 1: Admin and Business Function Support Roles Compared to All Employees Across UNCG*

	Admin Support FTE	Business Support FTE	Total Employees*
Academic Affairs	80	33	754
Chancellor	1	0	56
Enrollment Management	5	2	95
Finance and Administration	25	9	488
Information Technology Services	2	2	142
Intercollegiate Athletics	1	1	77
Research and Engagement	1	3	235
Student Affairs	15	9	279
University Advancement	6	1	64

*\*Faculty, temporary staff, and student workers are not captured in total employees; total employees do include funded vacancies*

Across the Academic Affairs division, there are a total of 80 administrative support full-time equivalents (FTEs) to support a division of 754 employees. In addition to the administrative support roles, there are also 33 business managers, business officers, and business support coordinators. All of these roles are spread out across all departments, with departments having between one and three individuals in those roles. This ratio of administrative support and business office-related positions to other employees is one of the lowest across all divisions and points to an opportunity to better manage that investment in administrative support.

Delivery of administrative support functions could be made more efficient by having personnel work across departments in a shared service model. A shared service model of this kind could improve service in the long term (once initial service disruptions that emerge with any change effort are resolved) and create a more equitable distribution of support functions. It could also allow staff to be flexible and respond to shifting priorities, while ultimately reducing staff over time through natural attrition and workload efficiencies. A shared service model provides opportunities for individuals to gain new or different experiences and opportunities for professional growth as they can specialize in a functional area and support multiple units with that specialization, which also helps reduce turnover in these essential roles.

2. Organizational Structure Redesign Opportunities

Simplifying the organization structure across various departments aims to increase the flow of ideas and decisions and streamline workflow across each team and down into the institution while also reducing costs. Based on a review of the 2023 organizational charts across all of UNCG, and confirmed by the June 2023 all employee data, below are potential opportunities for improved functional alignment and efficiencies if backfilling some of these roles is managed strategically:

- a. **Marketing and Communication Roles:** While there is a central marketing and communications staff that serves the university, a few other units operate their own teams of marketing and communication support, such as Advancement, Athletics, Housing and Residence Life, Campus Activities and Programs, Enrollment Management, the School of Nursing, and the Office of Research and Engagement. Like the decentralized business function above, UNCG should assess whether maintaining duplicative and decentralized marketing and communication

roles supports the institution in achieving the ideal level of marketing and communication support. This level of decentralization could hinder consistency in branding and messaging. UNCG should determine whether resources could be reclaimed centrally to serve the entire university community more effectively, reporting up through the Vice Chancellor for Strategic Communication.

- b. **Facilities:** UNCG has a robust facilities staff with some specialization – most notably an in-house architect and at least seven in-house engineers. UNCG also operates two different facilities staffs, one within finance and administration, and another within student affairs. Collectively, UNCG has more than 250 employees supporting the maintenance and upkeep of the buildings and grounds. This is a significant investment. UNCG should do its due diligence and ensure this level of investment is in line with industry standards.

### 3. Monitor UNCG Span of Control and Increase Over Time

Span of control refers to the number of direct reports a manager supervises. Over time, greater levels of complexity in job functions commonly leads to the accumulation of management layers, increasing the distance between leadership and the front line. Higher education benchmarks include average spans of 6–7 for expertise-based functions and average spans of 11–13 for task-based functions.

Creating higher spans drives effectiveness (higher value) by:

- Streamlining processes for more effective execution
- Focusing supervisors on highest-value work
- Empowering direct reports

Creating higher spans drives efficiency (lower cost) by:

- Eliminating redundant or lower-value supervisory activities (i.e., time spent communicating up and down the chain of command)
- Identifying and correcting for under-utilization of supervisory resources

The data used to calculate spans and layers savings for UNCG was submitted in June 2023. The data includes budgeted vacancies. The data also excludes faculty (but includes deans, directors, and coordinators), student workers, and temporary employees.

*Table 2: Spans and Layers Analysis of UNCG, July 2023*

Division	Supervisors	Total Employees	Span of Control
Academic Affairs	252	754	3.0
Chancellor	22	56	2.5
Enrollment Management	29	95	3.3
Finance and Administration	93	488	5.2
Information Technology Services	22	142	6.4
Intercollegiate Athletics	25	77	3.1
Research and Engagement	52	235	4.5
Student Affairs	73	279	3.8
University Advancement	22	64	2.9
	590	2,189	3.7

UNCG operates at a span of control of four – meaning that, across the institution, the average supervisor oversees four direct reports. However, this varies widely by division and within departments. UNCG should monitor this metric as part

of the effort to strategically realign staffing plans in response to lower student enrollment and identify opportunities to reduce managerial structures and increase spans of control for appropriate functions.

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3. Undergraduate Admissions – a total of 13 assistant and associate directors for an entire staff of only 29

### **Conclusion**

UNCG has invested considerable time and energy into assessing its resource allocations (people, time and money) and opportunities to maintain or enhance services while reducing costs. Achieving those opportunities will largely impact positions at UNCG. The review summarized above provides a roadmap and a set of tools that UNCG can use to design a new organization structure and the path to achieve that structure. This includes a move to shared services models and an ongoing review of spans and layers.

It will be important to separate the desired end state from the process and timing for implementing that end state. Meaning, UNCG can elect to move toward a new organization structure and related efficiencies more organically as vacancies emerge, or it can move more quickly to reallocate resources. These two approaches reflect a tradeoff between speed and the capture of cost savings.

**From:**  
**To:** [Katie Hagan](#); [Bob Shea](#);  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Updated Memo  
**Date:** Thursday, July 27, 2023 1:44:48 PM

---

Hi Katie,

This looks good. Thanks for sharing. My only recommendations:

- 2a. Instead of calling out the School of Nursing replace with Academic Colleges/Schools as many have their own comm units and this would be more inclusive.
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Thanks again for the opportunity to give feedback,

University of North Carolina Greensboro

Greensboro, NC 27412

---

**From:** Katie Hagan <khagan@rpkgroup.com>  
**Sent:** Thursday, July 27, 2023 1:18 PM  
**To:** Bob Shea

**Cc:** Mike Daly <mdaly@rpkgroup.com>  
**Subject:** Updated Memo



Hi Bob,

I hope you all are having a nice week. Attached is an updated version of the memo to reflect all of your excellent feedback. After speaking with [redacted] the one larger shift was combining the recommendation about business officers with the administrative support shared service recommendation given the overlap in the responsibilities across those roles in practice. This moves the recommendation from just sharing/pooling admins, to being more strategic about defining the functions you expect those administrative support-type roles to perform and organizing shared services around those.

Let me know if you have any questions. I'll plan to send this to [redacted] on Monday unless I hear otherwise from you all.

Best,  
Katie

**rpk** GROUP  
from mission to market

Katie Hagan | Principal | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Project Update  
**Date:** Friday, July 28, 2023 11:46:37 AM  
**Attachments:** [Outlook-shgzni3.png](#)

---

Hi [redacted] and Bob,

I'm shifting to a short email update this week, please let me know if you have any questions.

Activity this Week:

- Academic Deans received their first introduction to the dashboard and financial tables (7/26).
  - Overall, great engagement and participation by the Deans during the session as well as follow-up inquiries via email.
- Katie shared the final ASR report (7/27).
- rpk met with [redacted] to review the approach to the Market Demand analysis and discussed appropriate next steps (7/27).
  - [redacted] was appreciative of the time and opportunity to learn more and shared some concerns from the PRTF.
  - rpk will generate a revised narrative of the analysis that provides deeper methodological explanations and remove recommendations regarding Mental Health Counseling.
  - Mike will contact [redacted] to inquire about an appropriate time for rpk to provide the PRTF with more context regarding the methodology utilized for the Market Demand analysis.

Upcoming:

- Mike and [redacted] are meeting to review the PRTF's rubric (8/3).
- Katie is joining [redacted] at the Faculty Senate retreat to introduce the dashboard (8/11).

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

**From:**  
**To:** [Mike Daly](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Project Update  
**Date:** Friday, July 28, 2023 11:52:14 AM  
**Attachments:** [Outlook-shgzni3.png](#)

---

Thanks Mike,  
Appreciate your engagement with the deans!  
Talk with you next week,

University of North Carolina Greensboro  
Greensboro, NC 27412

---

**From:** Mike Daly <mdaly@rpkgroup.com>  
**Sent:** Friday, July 28, 2023 11:46 AM  
**To:** Bob Shea  
**Cc:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** UNCG/rpk Weekly Project Update

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Michael Daly | Senior Associate | [rpk GROUP](#)

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mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#);  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Updated Memo  
**Date:** Saturday, July 29, 2023 6:42:06 AM

---

Thank you, both! I've made those adjustments.

Should I send the memo directly to [redacted] on Monday, or would it be better received if I sent it to you all and you forward to him?

Thanks,  
Katie

---

**From:** Bob Shea  
**Sent:** Thursday, July 27, 2023 2:36 PM  
**To:** [redacted]; Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>;  
**Cc:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Subject:** Re: Updated Memo

No changes from me.

---

**From:** [redacted]  
**Date:** Thursday, July 27, 2023 at 1:44 PM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>, Bob Shea  
**Cc:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Subject:** Re: Updated Memo

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Greensboro, NC 27412

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**From:** Katie Hagan <khagan@rpkgroup.com>

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**To:** Bob Shea

**Cc:** Mike Daly <mdaly@rpkgroup.com>

**Subject:** Updated Memo

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**rpk** GROUP  
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Katie Hagan | Principal | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com) | 757-589-0490

**From:**  
**To:** [Katie Hagan](#);  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Updated Memo  
**Date:** Saturday, July 29, 2023 7:03:40 AM

---

Good morning. I suggest you send directly to [redacted]. Have a great weekend.

---

**From:** Katie Hagan <khagan@rpkgroup.com>  
**Sent:** Saturday, July 29, 2023 6:42 AM  
**To:** Bob Shea

**Cc:** Mike Daly <mdaly@rpkgroup.com>  
**Subject:** Re: Updated Memo

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Katie

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**From:** Bob Shea  
**Sent:** Thursday, July 27, 2023 2:36 PM  
**To:** [redacted] Katie Hagan <khagan@rpkgroup.com>;

**Cc:** Mike Daly <mdaly@rpkgroup.com>  
**Subject:** Re: Updated Memo

No changes from me.

---

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**Date:** Thursday, July 27, 2023 at 1:44 PM  
**To:** Katie Hagan <khagan@rpkgroup.com>, Bob Shea

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**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#);  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Updated Memo  
**Date:** Monday, July 31, 2023 6:50:05 AM

---

Will do, thank you!

---

**From:** Bob Shea  
**Sent:** Monday, July 31, 2023 6:17 AM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>;

**Cc:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Subject:** Re: Updated Memo

Agree with

Get [Outlook for iOS](#)

---

**From:**  
**Sent:** Saturday, July 29, 2023 7:03:34 AM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>; Bob Shea

**Cc:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
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[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com) | 757-589-0490

**From:** [Katie Hagan](#)  
**To:**  
**Cc:** ; [Bob Shea](#)  
**Subject:** rpk Human Resources Assessment  
**Date:** Monday, July 31, 2023 8:01:18 AM  
**Attachments:** [UNCG HR Analyses Summary Memo from rpk GROUP 7.31.23.pdf](#)

---

Hello

I hope you had a nice weekend. Attached is a memo from our team at rpk GROUP which provides an analysis of human resources-related data and makes recommendations related to staffing and restructuring. This work followed that of the Task Force on Financial Sustainability and was built specifically on the recommendations related to staffing levels.

Please let me know if you have any questions after you review, or if you would like to meet to discuss our findings.

Best,  
Katie Hagan

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from mission to market

Katie Hagan | Principal | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490

**University of North Carolina Greensboro**  
**Human Resources Analyses to Support Administrative Cost Savings**  
**July 31, 2023**

## **Background**

University of North Carolina Greensboro (UNCG) partnered with rpk GROUP (rpk) for a comprehensive project to develop a framework and database for academic portfolio and resource evaluation, as well as to support analyses to lead to administrative cost savings. To support UNCG's efforts to identify administrative cost savings, Katie Hagan from rpk participated in the Chancellor's Task Force on Financial Sustainability, and rpk fielded a feedback survey to surface ideas for the Task Force and provided feedback and guidance throughout the Task Force meetings as recommendations emerged. One of the key recommendations of the Task Force was to take a closer look at the staffing levels at UNCG, ideally with the goal of achieving financial savings over time through strategic staffing reorganization. This memo captures additional analyses provided by rpk and makes more specific recommendations as to how UNCG can begin working towards strategic reorganization and alignment of staffing to the reduced student population that UNCG now serves.

The recommendations below are informed by a review of the current organizational structure and staffing levels. The data used were 2023 organizational charts as well as a July 2023 all employee report. In addition to quantitative and personnel data, rpk reviewed the results of the campus survey that was fielded in support of the Task Force, and drew upon the firm's experiences working with UNCG for the last eight months.

## **Recommendations**

The recommendations from rpk are as follows:

1. Shared Services - Implement a shared services model for administrative support staff, focusing initially on academic affairs.
2. Restructure of Key Functions - Redesign of business officer, marketing and communications, and facilities functions and roles to achieve efficiency.
3. Spans and Layers - Monitor UNCG institutional span of control and increase the span over time.

### **1. Shared Services Approach to Administrative Support Functions**

Within the education sector nationally, there is a move to create, redesign and expand shared services models. These models provide greater efficiency and reduced cost, while aiming to maintain and more equitably distribute service delivery. Standardizing and optimizing processes and workflow are essential components of shared services' success. The streamlined workflow will support an emphasis on continuous business process improvement through automation, process expertise, and data analysis. Shared services can offer a more effective and efficient approach to service delivery for administrative support functions, such as business processes, human resources processes, and scheduling. Meaning, instead of every unit having their own business officer and administrative assistant, a central unit is created that would provide the services typically performed by those roles and existing personnel move into that shared unit. This central unit would then organize into administrative functions, shifting the role of the administrative assistant or business officer from needing to be knowledgeable about all HR, finance, and operational functions, to creating more specialization in those support roles. These central functions operate with clear service agreements with the units that use their support, and have reporting relationships with the central office functions for which they are aligned (HR and finance) to ensure accuracy and consistency in workflows and processes.

We recommend that UNCG pilot this approach in Academic Affairs, then spread that approach across the institution over time if successful.

*Table 1: Admin and Business Function Support Roles Compared to All Employees Across UNCG*

	Admin Support FTE	Business Support FTE	Total Employees*
Academic Affairs	80	33	754
Chancellor	1	0	56
Enrollment Management	5	2	95
Finance and Administration	25	9	488
Information Technology Services	2	2	142
Intercollegiate Athletics	1	1	77
Research and Engagement	1	3	235
Student Affairs	15	9	279
University Advancement	6	1	64

*\*Faculty, temporary staff, and student workers are not captured in total employees; total employees do include funded vacancies*

Across the Academic Affairs division, there are a total of 80 administrative support full-time equivalents (FTEs) to support a division of 754 employees. In addition to the administrative support roles, there are also 33 business managers, business officers, and business support coordinators. All of these roles are spread out across all departments, with departments having between one and three individuals in those roles. This ratio of administrative support and business office-related positions to other employees is one of the lowest across all divisions and points to an opportunity to better manage that investment in administrative support.

Delivery of administrative support functions could be made more efficient by having personnel work across departments in a shared service model. A shared service model of this kind could improve service in the long term (once initial service disruptions that emerge with any change effort are resolved) and create a more equitable distribution of support functions. It could also allow staff to be flexible and respond to shifting priorities, while ultimately reducing staff over time through natural attrition and workload efficiencies. A shared service model provides opportunities for individuals to gain new or different experiences and opportunities for professional growth as they can specialize in a functional area and support multiple units with that specialization, which also helps reduce turnover in these essential roles.

2. Organizational Structure Redesign Opportunities

Simplifying the organization structure across various departments aims to increase the flow of ideas and decisions and streamline workflow across each team and down into the institution while also reducing costs. Based on a review of the 2023 organizational charts across all of UNCG, and confirmed by the June 2023 all employee data, below are potential opportunities for improved functional alignment and efficiencies if backfilling some of these roles is managed strategically:

- a. **Marketing and Communication Roles:** While there is a central marketing and communications staff that serves the university, a few other units operate their own teams of marketing and communication support, such as Advancement, Athletics, Housing and Residence Life, Campus Activities and Programs, Enrollment Management, the Office of Research and Engagement, and the schools and colleges. Like the decentralized business function above, UNCG should assess whether maintaining duplicative and decentralized marketing and communication

roles supports the institution in achieving the ideal level of marketing and communication support. This level of decentralization could hinder consistency in branding and messaging. UNCG should determine whether resources could be reclaimed centrally to serve the entire university community more effectively, reporting up through the Vice Chancellor for Strategic Communication.

- b. **Facilities:** UNCG has a robust facilities staff with some specialization – most notably an in-house architect and at least seven in-house engineers. UNCG also operates two different facilities staffs, one within finance and administration, and another within student affairs. Collectively, UNCG has more than 250 employees supporting the maintenance and upkeep of the buildings and grounds. This is a significant investment. UNCG should do its due diligence and ensure this level of investment is in line with industry standards.

### 3. Monitor UNCG Span of Control and Increase Over Time

Span of control refers to the number of direct reports a manager supervises. Over time, greater levels of complexity in job functions commonly leads to the accumulation of management layers, increasing the distance between leadership and the front line. Higher education benchmarks include average spans of 6–7 for expertise-based functions and average spans of 11–13 for task-based functions.

Creating higher spans drives effectiveness (higher value) by:

- Streamlining processes for more effective execution
- Focusing supervisors on highest-value work
- Empowering direct reports

Creating higher spans drives efficiency (lower cost) by:

- Eliminating redundant or lower-value supervisory activities (i.e., time spent communicating up and down the chain of command)
- Identifying and correcting for under-utilization of supervisory resources

The data used to calculate spans and layers savings for UNCG was submitted in June 2023. The data includes budgeted vacancies. The data also excludes faculty (but includes deans, directors, and coordinators), student workers, and temporary employees.

*Table 2: Spans and Layers Analysis of UNCG, July 2023*

Division	Supervisors	Total Employees	Span of Control
Academic Affairs	252	754	3.0
Chancellor	22	56	2.5
Enrollment Management	29	95	3.3
Finance and Administration	93	488	5.2
Information Technology Services	22	142	6.4
Intercollegiate Athletics	25	77	3.1
Research and Engagement	52	235	4.5
Student Affairs	73	279	3.8
University Advancement	22	64	2.9
	590	2,189	3.7

UNCG operates at a span of control of four – meaning that, across the institution, the average supervisor oversees four direct reports. However, this varies widely by division and within departments. UNCG should monitor this metric as part

of the effort to strategically realign staffing plans in response to lower student enrollment and identify opportunities to reduce managerial structures and increase spans of control for appropriate functions.

### **Conclusion**

UNCG has invested considerable time and energy into assessing its resource allocations (people, time and money) and opportunities to maintain or enhance services while reducing costs. Achieving those opportunities will largely impact positions at UNCG. The review summarized above provides a roadmap and a set of tools that UNCG can use to design a new organization structure and the path to achieve that structure. This includes a move to shared services models and an ongoing review of spans and layers.

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DRAFT



**From:** [Rick Staisloff](#)  
**To:** [Bob Shea](#)  
**Cc:** [Laura Reames](#);  
**Subject:** UNCG - Progress Invoice 23-0063 - June - RPK GROUP  
**Date:** Tuesday, August 1, 2023 4:10:52 PM  
**Attachments:** [image001.png](#)  
[UNCG - rpk GROUP - Progress Invoice 23-0078 - June.pdf](#)

---

Bob,

Attached please find our progress invoice for June.

Let me know if you have any questions, or require additional information to process this.

Regards,

Rick

**rpK** GROUP  
from mission to market

Richard Staisloff | Senior Partner | [rpK GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rtaisloff@rpkgroup.com](mailto:rtaisloff@rpkgroup.com) | Cell: 410-591-9018

# rpk GROUP

626C Admiral Drive, Suite 511  
Annapolis, MD 21401, United States  
Tel: 410-591-9018  
rstaisloff@rpkgroup.com  
www.rpkgroup.com



## INVOICE

Robert Shea  
University of North Carolina-Greensboro  
1400 Spring Garden Ct  
Greensboro, NC 27412

TAX ID:  
INVOICE DATE: 7/14/2023  
INVOICE NO: 23-0078  
BILLING THROUGH: 6/30/2023

PROFESSIONAL SERVICES	HOURS	RATE	AMOUNT
Ana yst	2.25	\$225.000	\$506.25
Assoc ate	117.75	\$294.002	\$34,618.75
Pr nc pa	4.75	\$450.000	\$2,137.50
<b>TOTAL SERVICES</b>	<b>124.75</b>		<b>\$37,262.50</b>
		<b>SUBTOTAL</b>	<b>\$37,262.50</b>
		<b>AMOUNT DUE THIS INVOICE</b>	<b>\$37,262.50</b>

This invoice is due on 8/13/2023

Richard Staisloff, Senior Partner  
rstaisloff@rpkgroup.com

Laura Reames, Billing Contact  
lreames@rpkgroup.com

Remit payment to:  
rpk GROUP  
626C Admiral Drive, Suite 511  
Annapolis, MD 21401

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Project Update and Revised Market Analysis (for review)  
**Date:** Friday, August 4, 2023 11:31:59 AM  
**Attachments:** [Outlook-mvyhavr.png](#)  
[UNCG Weekly Project Update 2023.08.04.pdf](#)  
[UNCG MDO Memo\\_Final\\_080323 \(revised\).pdf](#)

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Hi and Bob,

Attached is the weekly project tracker for your reference. Note that I've labeled the project's overall status as 'on-track/complete' to reflect the finished ASR work and remaining engagements/meetings related to the dashboards.

Also attached is the revised Market Analysis narrative. I'd encourage your review and any needed discussions with us before sharing on the project's site.

Have a great weekend!

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
mdaly@rpkgroup.com | Cell: 518-796-2209

UNCG




# UNCG & rpk GROUP

## Status Report: August 4, 2023

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# Project Overview: July 28 – August 4

Overall Status	Project Status Overview & Key Items for Attention	
	Project in on-track for final completion over next two weeks.	
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>• Katie shared final Administrative Services Report with (7/31).</li> <li>• Revised and shared Market Demand &amp; Opportunity analysis (8/4).</li> </ul>	<ul style="list-style-type: none"> <li>• Mike attending Academic Dashboard introduction and training with Department Chairs, Program Heads and Directors (8/7).</li> <li>• Mike facilitating continued conversation with Deans and Assistant Deans related to shared financial tables (8/8).</li> <li>• Katie attending Faculty Senate retreat and participating in introduction of Academic Dashboards (8/11).</li> <li>• Mike providing UNCR IR with definitions and approaches related to financial tables (8/14).</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>• Scheduled trainings for Department Chairs, Program Heads, and Directors</li> <li>• Scheduled session with Academic Deans and Assistant Deans related to shared financial tables.</li> </ul>	<ul style="list-style-type: none"> <li>• Finalizing access permissions for stakeholder groups to use dashboards.</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started
					

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July					Aug
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31	7
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																										
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete																
Dashboard Development															On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	At Risk	Complete	Complete	Complete	Complete	Complete				
Dashboards Shared with Deans																							Off Track	Off Track	Off Track	Off Track	Not Started	On Track	On Track	Complete	Complete	Complete
Dashboards Shared with Chairs																							Off Track	Off Track	Off Track	Not Started	Not Started	Not Started	On Track	On Track	On Track	
Dashboards Shared with Taskforce																								Off Track	Off Track	On Track	On Track	Complete	Complete	Complete	Complete	
Faculty Workshops										Complete	Complete	On Track	On Track	On Track	On Track	On Track	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	On Track	On Track	On Track	Not Started	Not Started	Not Started	Not Started	Not Started	

*Workshops with faculty will be led by UNCG during the Fall term.*

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Completed - Administrative Services Review

Phase	January					February				March				April				May				June				July					
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk														
Final Report & Recommendations																		Complete	Complete	Complete	At Risk	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Dashboard Training for Department Chairs, Program Heads, and Directors	[REDACTED] and Mike Daly	8/8; 2:00pm	
Financial Tables Conversation with Deans and Assistant Deans	UNCG Deans, Assistant Deans, and Mike Daly	8/9; 1:00pm	
Dashboard introduction for Faculty Senate	[REDACTED] Katie Hagan	8/11	On-site
UNCG IR/rpk Financial Table definitions	UNCG IR, Mike Daly, and Raven Moody	8/14; 2:00pm	

Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

## Market Demand & Opportunity Analysis University of North Carolina Greensboro (UNCG)

August 3, 2023 (revised)<sup>1</sup>

The Market Demand and Opportunity (MDO) analysis is designed to provide forward-looking insight into the alignment between UNCG's current academic portfolio (all certificate and degree offerings) and expected employment opportunities in North Carolina over the next decade. The MDO analysis incorporates three different approaches to assess the alignment between UNCG's programs and projected labor market demand:

- **Program analysis** examines the North Carolina labor market demand and wages for occupations that map to existing UNCG programs.
- **Competitor analysis** examines the strength of similar program offerings at other four-year competitor institutions in North Carolina.
- **Gap analysis** identifies growing occupations for which UNCG does not currently offer programs, and the competitor landscape surrounding the programs to prepare students for these jobs.

### **Key highlights from these analyses show:**

- Two-thirds, or 121, of UNCG's academic programs are preparing students for occupations with a strong or moderate employment outlook and above median wages.
- Only about 20% of UNCG programs (39) have a weak employment outlook, but three-quarters of those programs (28) still prepare students for occupations with higher-than-median wages.
- The School of Nursing and the School of Business and Economics are most likely to offer programs (100% and 76%, respectively) that position graduates to access occupations with strong employment and wage opportunities.
- Programs with the weakest employment outlook are concentrated in the School of Music Department and the Consumer Apparel-Retail Studies Department in the School of Business and Economics.
- Thirty percent of UNCG's current programs (65) have a strong market position, with few competitor institutions offering similar programs, accompanied by evidence of robust student demand among the institutions that do offer those programs. In the Schools of Business and Economics and Education, more than 40% of the programs demonstrate a strong market position.
- Engineering programs (Civil, Industrial, and Mechanical) should be considered as a potential new investment area for UNCG since these high-wage occupations can expect strong employment growth in North Carolina.

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<sup>1</sup> This document replaces a previously shared version dated June 1, 2023. It removes recommendations to explore new academic programs related to substance abuse, behavioral disorder, and mental health counselors as UNCG already offers several programs. It also includes new methodological details in the appendix.



## North Carolina Statewide Employment Trends

North Carolina is projected to add 445,700 new jobs between 2021 and 2030, an increase of 9%. During this same period, more than 6.3 million job openings (705,600 annually) are projected from a combination of new job creation and workers leaving their current jobs as they exit the labor force or change occupations.

The fastest **new job growth** is in computer and mathematical occupations (21%) which includes college-level jobs, followed by healthcare support, personal care and service, and food preparation and serving occupations which primarily include non-college level jobs.

The greatest **number of job openings** over the next decade are expected in non-college level occupations, which tend to experience more worker turnover (see Figure 1). Among occupations with heavy concentrations of college-level jobs, those with the most job openings include management (36,400 annually), business and financial operations (36,000 annually), and educational instruction and library (30,400 annually).

### Program Analysis

The program analysis demonstrates how well UNCG's current academic programs serve the North Carolina state economy and the student populations enrolled post-graduation. In both the program and gap analyses, programs are organized into three employment categories:

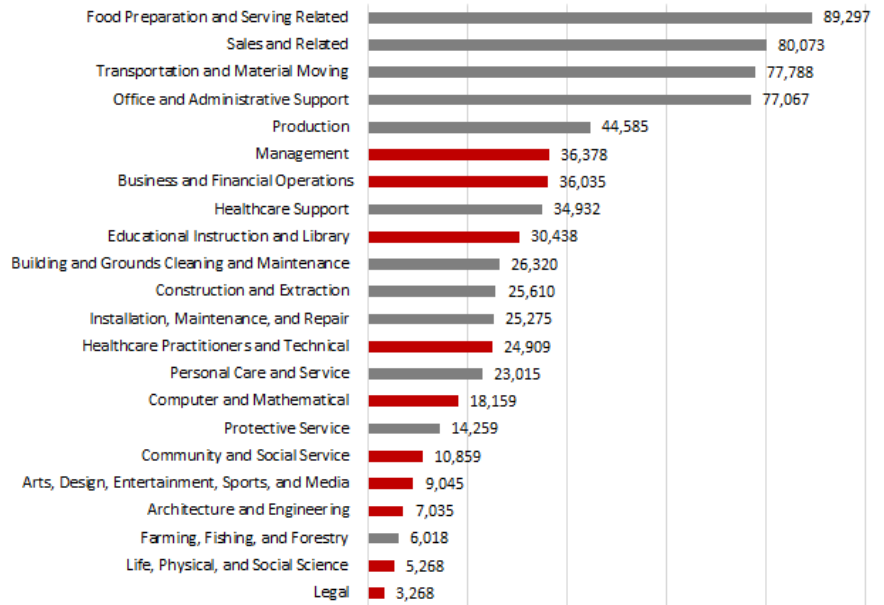
1. **Strong Employment Outlook** – at or above average new job growth *and* job openings
2. **Moderate Employment Outlook** - new job growth at or above average *and* below-average job openings **OR** below-average new job growth *and* job openings at or above average
3. **Weak Employment Outlook** - below average new job growth *and* below average job openings

and two wage areas:

1. **High Wage** - equal or exceeding the median annual wage
2. **Low Wage** - below median annual wage

Results from the program analysis show that the majority of UNCG's current academic programs (130 or 70%) have a strong or moderate employment outlook (see Table 1). These programs are equally distributed within these two employment outlook categories, and nearly all programs with strong employment outlook offer higher than median wages (34%), as do most programs with a moderate outlook (31%). Even programs with a weak employment outlook tend to offer high wages, but eight programs (4%) offer low wages and a weak employment outlook.

Figure 1: North Carolina Projected Annual Job Openings by Occupational Group, 2021-2030



Note: Red bars indicate the typical education level for that occupation includes a college degree.  
Source: rpk GROUP analysis of North Carolina Occupational Employment Projections, 2021-2030, North Carolina Department of Commerce.

**Table 1: Employment and Wage Outlook for UNCG Academic Programs**

Employment Outlook	Wage Category	Program Count	Program % Distribution
Strong Employment Outlook	High Wage	64	34%
	Low Wage	1	1%
<b>Strong Employment Outlook Total</b>		<b>65</b>	<b>35%</b>
Moderate Employment Outlook	High Wage	57	31%
	Low Wage	8	4%
<b>Moderate Employment Outlook Total</b>		<b>65</b>	<b>35%</b>
Weak Employment Outlook	High Wage	28	15%
	Low Wage	8	4%
	No Wage Category	3	2%
<b>Weak Employment Outlook Total</b>		<b>39</b>	<b>21%</b>
No Employment Category		17	9%
<b>No Employment Category Total</b>		<b>17</b>	<b>9%</b>
<b>Total</b>		<b>186</b>	<b>100%</b>
<b>Average New Job Growth in NC 9.1%   Average Annual Job Openings in NC 857   Median Annual Wage in NC \$47,745</b>			
Note: The 'no employment category' includes 1) occupations without projections because they do not meet the North Carolina Department of Commerce's reporting threshold, or 2) occupations without a match in the Classification of Instructional Programs (CIP) – Standard Occupational Classification (SOC) crosswalk and a custom match could not be identified. All programs linked to the liberal arts index (occupations in which liberal arts graduates are often employed; see Appendix) are categorized as having a Strong Employment Outlook and High Wage; these programs are <b>not</b> included in this table. Source: rpk GROUP analysis of UNCG Academic Programs data and NC Department of Commerce Employment Projections, 2021-2030.			

UNCG’s academic programs with the most promising employment outlook and high wages are found across six different colleges and at all award levels (See Table 2). Each of these programs prepares students for occupations where new job growth is projected to equal or exceed 25% and approximately 1,000 or more annual job openings.

Among the programs with the strongest outlook, bachelor’s and master’s degrees in **Computer Science** are linked to occupations where more than 10,000 job openings are expected annually. Master’s degrees in **Informatics & Analytics** and bachelor’s degrees in **Information Science** are both expected to provide access to occupations where more than 7,000 job openings are expected annually. Doctoral-level **Nursing** programs are preparing graduates for occupations projected to grow by 40% over the next decade and expected to offer about 1,100 job openings annually. Occupations tend to employ workers with different levels of educational preparation, so different degrees and certificates offered within similar programs may provide access to the same occupations. Differing education levels could lead to different levels of responsibility and wages earned within those occupations.

rpk GROUP compiled an index of jobs where liberal arts graduates have been historically employed (see Appendix, Table A1). UNCG graduates with liberal arts degrees (see Appendix, Table A2) can also expect to find strong employment opportunities in North Carolina. These occupations are collectively expected to grow 12.8% between 2021 and 2030 and offer 81,500 annual job openings, alongside above-median wages.



**Table 2: Top 10 UNCG Programs with Strong Employment Outlook and High Wages**

College/School	Department	Program	Award	Projected New Job Growth 2021-2030	Projected Average Annual Job Openings 2021-2030	Median Annual Wage 2021
Nursing	Nursing	Doctor of Nursing Practice	Doctorate	40%	1,103	\$94,458
Nursing	Nursing	Nursing	Doctorate	40%	1,103	\$94,458
Business and Economics	Consumer Apparel-Retail Studies	Global Apparel Supply Chain Management	Certificate	36%	969	\$63,640
Business and Economics	Info Systems and Supply Chain Management	Supply Chain Management	Certificate	36%	969	\$63,640
Interdisciplinary	Health Management	Health Management	Master's	32%	1,776	\$99,630
Arts and Sciences	Informatics and Analytics	Informatics & Analytics	Master's	29%	7,802	\$112,989
Education	Library & Information Science	Information Science	Bachelor's	28%	7,684	\$112,252
Arts and Sciences	Computer Science	Computer Science	Master's	27%	10,827	\$109,386
Arts and Sciences	Computer Science	Computer Science	Bachelor's	27%	11,241	\$107,781
Health and Human Sciences	Public Health Education	Community Health Education	Doctorate	25%	1,468	\$105,250

Note: Programs aligned with occupations accessible to liberal arts graduates are not included in this table because none were in the top 10 ranking. Occupations may map to multiple programs because there are various degrees and programs that prepare students to access a particular occupation; in these instances, different programs may display the same employment and wage data.  
 Source: rpk GROUP analysis of UNCG Academic Programs data and NC Department of Commerce Employment Projections, 2021-2030.

UNCG also offers several programs with weak employment and earnings prospects (see Table 3). These programs are concentrated in the College of Visual/Performing Arts and the School of Business and Economics. Employment opportunities for certificates, master's and doctoral degrees in music, performance, and study have below average job growth, annual openings, and wages. Similarly, five programs offered in the department of consumer apparel-retail studies are preparing students across all degree levels for occupations with little expected growth.

**Table 3: UNCG Programs with Weak Employment Outlook and Low Wages**

College/School	Department	Program	Award	Projected New Job Growth 2021-2030	Projected Average Annual Job Openings 2021-2030	Median Annual Wage 2021
Visual/Performing Arts	School of Music	Music	Doctorate	8%	815	\$35,726
Visual/Performing Arts	School of Music	Performance	Master's	8%	815	\$35,726
Visual/Performing Arts	School of Music	Music Performance Study	Certificate	8%	529	\$ 14,442
Business and Economics	Consumer Apparel-Retail Studies	Consumer, Apparel, and Retail Studies	Bachelor's	1%	12	\$ 31,260
Business and Economics	Consumer Apparel-Retail Studies	Consumer, Apparel, and Retail Studies	Doctorate	1%	15	\$31,260
Business and Economics	Consumer Apparel-Retail Studies	Global Fashion Industry Management	Certificate	1%	12	\$31,260
Business and Economics	Consumer Apparel-Retail Studies	Retail Consumer Data Analytics	Certificate	1%	12	\$31,260
Business and Economics	Consumer Apparel-Retail Studies	Retail Studies	Master's	1%	12	\$31,260

Note: Occupations may map to multiple programs because there are various degrees and programs that prepare students to access a particular occupation; in these instances, different programs may display the same employment and wage data.

As we look within individual UNCG schools, it's clear that all schools (except Nursing) offer programs with strong, moderate, and weak employment outlooks (see Table 4). All Nursing school programs are well-positioned to prepare graduates for occupations with strong employment opportunities and high wages. The School of Business and Economics also offers a high concentration of programs (74%) with similarly strong employment growth and wages.

The College of Visual/Performing Arts offers programs with a variety of employment outlooks, but about 60% of their programs are linked to occupations with a weak employment outlook; even so, half of those programs still offer high wages. The Joint School of Nanoscience/Nanoengineering is the only college or school without programs linked to occupations with a strong employment outlook; three out of seven programs it offers have a weak employment outlook, although all programs are linked to occupations that offer higher than median wages.

**Table 4: Employment and Wage Outlook Distribution Across Colleges and Schools (Program Count & Distribution)**

Employment Outlook	Wage Category	Arts and Sciences	Visual/Performing Arts	Health and Human Sciences	Nanoscience / Nano-engineering	Business and Economics	Education	Nursing
Strong Employment Outlook	High Wage	18 (35%)	1 (4%)	5 (15%)		26 (74%)	6 (21%)	8 (100%)
	Low Wage			1 (3%)				
Moderate Employment Outlook	High Wage	20 (38%)	4 (17%)	15 (44%)	2 (29%)	1 (3%)	16 (55%)	
	Low Wage	1 (2%)	1 (4%)	6 (18%)				
Weak Employment Outlook	High Wage	7 (13%)	8 (35%)	3 (9%)	3 (43%)	2 (6%)	5 (17%)	
	Low Wage		3 (13%)			5 (14%)		
	No Wage Category		3 (13%)					
No Employment Category	No Wage Category	6 (12%)	3 (13%)	4 (12%)	2 (29%)	1 (3%)	2 (7%)	
<b>Total</b>		<b>52 (100%)</b>	<b>23 (100%)</b>	<b>34 (100%)</b>	<b>7 (100%)</b>	<b>35 (100%)</b>	<b>29 (100%)</b>	<b>8 (100%)</b>

Note: There are 188 total programs shown in this table because two programs are affiliated with more than one college/school.

Source: rpk GROUP analysis of UNCG Academic Programs data and NC Department of Commerce Employment Projections, 2021-2030.

## Competitor Analysis

The competitor analysis examines the market viability and opportunity of the academic programs currently offered by UNCG. Information from the National Student Clearinghouse was used to identify UNCG's 10 largest competitor institutions, all of which are located in North Carolina (see Appendix, Table A3). By connecting competitor program awards to similar programs at UNCG, the market saturation (number of competitors offering the program) and program demand (competitor growth in degree and certificates awards) can be assessed in the competitor space. Programs are organized into three categories informed by market saturation and competitor growth in degree and certificate awards:

- Strong Market Opportunity** - below 50% market saturation & at least 50% of competitors offering the program demonstrate positive growth
- Moderate Market Opportunity** - below 50% market saturation & less than 50% of competitors offering the program demonstrate positive growth OR Above 50% market saturation & at least 50% of competitors offering the program demonstrate positive growth

3. **Limited Market Opportunity** - above 50% market saturation & less than 50% of competitors offering the program demonstrate positive growth

Results from the competitor analysis show that 30% of UNCG’s current programs are strongly positioned to take advantage of market opportunities, with anticipated student interest and few offerings among competitor institutions (see Table 5). Two-thirds of these programs offer bachelor’s degree (11%) or postbaccalaureate certificates (9%). Another quarter of UNCG’s programs indicate moderate market opportunities, with most at the bachelor’s (11%) and master’s (9%) degree levels. Only 11% of UNCG’s programs are expected to have limited market opportunity because of strong competition or limited visible demand among the university’s competitors.

**Table 5: Market Opportunity for UNCG Academic Programs**

Market Opportunity	Award	Program Count	Program % Distribution
Strong Market Opportunity	Bachelor's	23	11%
	Postbaccalaureate certificate	20	9%
	Master's	14	7%
	Doctorate	8	4%
<b>Strong Market Opportunity Total</b>		<b>65</b>	<b>30%</b>
Moderate Market Opportunity	Bachelor's	24	11%
	Postbaccalaureate certificate	3	1%
	Master's	19	9%
	Post-master's certificate	1	0%
	Doctorate	9	4%
<b>Moderate Market Opportunity Total</b>		<b>56</b>	<b>26%</b>
Limited Market Opportunity	Bachelor's	14	7%
	Master's	9	4%
<b>Limited Market Opportunity Total</b>		<b>23</b>	<b>11%</b>
No Competitor Data	Bachelor's	4	2%
	Postbaccalaureate certificate	39	18%
	Master's	14	7%
	Post-master's certificate	3	1%
	Doctorate	11	5%
<b>No Competitor Data Total</b>		<b>71</b>	<b>33%</b>
<b>Total</b>		<b>215</b>	<b>100%</b>

Note: 'No Competitor Data' indicates a competitor could offer the program, but completions are <1 across FY18 – FY21; alternately, competitors may classify a similar program using a different CIP code.  
 Source: rpk GROUP analysis of IPEDS Completions Survey, 2018-2021.

In the School of Business and Economics more than 40% of the programs are expected to have a strong market position (see Table 6). In addition, 30% or more of programs offered in the College of Arts and Sciences, Schools of Health and Human Sciences, Education, and Joint School of Nanoscience/Nanoengineering are strongly positioned to serve student interested in the current market environment. The Colleges of Arts and Sciences, offers the greatest number of programs (12, or 17%) with the limited market opportunities because of low student demand or strong existing competition.

**Table 6: Market Opportunity Distribution Across Colleges and Schools (Program Count and Distribution)**

Market Opportunity	Arts and Sciences	Visual/ Performing Arts	Health and Human Sciences	Nanoscience / Nano-engineering	Business and Economics	Education	Nursing
Strong Market Opportunity	21 (30%)	3 (10%)	13 (36%)	2 (29%)	15 (43%)	11 (38%)	
Moderate Market Opportunity	23 (32%)	10 (32%)	11 (31%)		4 (11%)	6 (21%)	3 (38%)
Limited Market Opportunity	12 (17%)	3 (10%)	1 (3%)		2 (6%)	4 (14%)	1 (13%)
No Competitor Data	15 (21%)	15 (48%)	11 (31%)	5 (71%)	14 (40%)	8 (28%)	4 (50%)
<b>Total</b>	<b>71 (100%)</b>	<b>31 (100%)</b>	<b>36 (100%)</b>	<b>7 (100%)</b>	<b>35 (100%)</b>	<b>29 (100%)</b>	<b>8 (100%)</b>

Note: 'No Competitor Data' indicates competitors could offer a program, but awards are <1 across FY18 – FY21; alternately, competitors may use a different CIP code to classify a similar program. There are 217 total programs shown in this table because two programs are affiliated with more than one college/school.  
 Source: rpk GROUP analysis of IPEDS Completions Survey, 2018-2021.

**Gap Analysis**

The gap analysis takes a statewide perspective on employment growth. It looks to identify occupations where strong or moderate job growth is expected in North Carolina, but UNCG does not offer any programs preparing students for those jobs. The gap analysis highlights areas of consideration for potential academic program development.

**Table 7: Occupations with Strong/Moderate Employment Outlook, High Wages, and No Affiliated UNCG Program**

Occupation Code (SOC)	Occupation	Typical Educational Requirement	Projected New Job Growth 2021-2030	Projected Average Annual Job Openings 2021-2030	Median Annual Wage 2021
29-1071	Physician Assistants	Master's	29%	624	\$107,330
29-1123	Physical Therapists	Doctoral/ Professional	19%	532	\$79,240
17-2112	Industrial Engineers	Bachelor's	16%	818	\$81,380
17-2051	Civil Engineers	Bachelor's	14%	1,107	\$78,960
17-2141	Mechanical Engineers	Bachelor's	12%	711	\$79,570
23-1011	Lawyers	Doctoral/ Professional	11%	1,133	\$105,140
29-2010	Clinical Laboratory Technologists and Technicians	Bachelor's	9%	1,077	\$48,000

Note: Table includes high-wage occupations with a strong employment outlook, and high-wage occupations with a moderate employment outlook where new job growth is above average and annual job openings are greater than 500. Occupations accessible with a liberal arts degree are excluded from this table.  
 Source: rpk GROUP analysis of UNCG Academic Programs data and NC Department of Commerce Employment Projections, 2021-2030.

The gap analysis reveals eight occupations at various degree levels that could be candidates for program consideration (see Table 7). The occupations are centered in **health care, engineering, and the legal field**. Development of these programs may require creating new colleges, schools, or departments since few are aligned with existing UNCG schools.

In the health field, **Physician Assistants and Physical Therapists** both require graduate-level programs, while **Clinical Laboratory Technologists and Technicians** typically earn bachelor's degrees. Within engineering, **Civil and Mechanical Engineers** are expected to offer strong employment opportunities and require only bachelor's degree programs. While **Lawyers** will have similar opportunities, preparing students for those opportunities would require the creation of a post-graduate professional school.



This analysis also considered other state colleges and universities that may already offer programs preparing students for these jobs. It includes the same ten institutions included in the competitor analysis (see Appendix, Table A3). The data show that very few UNCG competitors, generally one or two institutions, offer the programs that will prepare students for these growing occupations. Only one program, a physical therapist doctoral degree, was offered by almost half of the competitor institutions (see Table 8).

**Table 8: Competitor Analysis for Areas Identified as UNCG Program Gaps**

Occupation	Programs Linked to Occupation	UNCG Competitors Offering the Program	Average Awards per Year	Number of Competitors by Growth Trend 2017-2021		
				Positive	None	Negative
<b>Strong Employment Outlook</b>						
Civil engineers	Civil Engineering, General - Bachelor's	2	118	2	0	0
	Civil Engineering, General - Master's	2	41	2	0	0
	Construction Engineering - Bachelor's	1	16	0	1	0
	Construction Engineering - Master's	1	4	1	0	0
Clinical laboratory technologists and technicians	Clinical Laboratory Science/Medical Technology/Technologist - Bachelor's	3	25	2	0	1
	Clinical Laboratory Science/Medical Technology/Technologist - Master's	1	5	0	0	1
Lawyers	Law – Doctorate/Professional	2	162	0	0	2
	Programs for Foreign Lawyers - Master's	1	2	0	0	1
<b>Moderate Employment Outlook</b>						
Industrial engineers	Engineering/Industrial Management - Bachelor's	1	15	1	0	0
	Engineering/Industrial Management - Master's	2	20	1	0	1
	Industrial Engineering - Bachelor's	1	92	1	0	0
	Industrial Engineering - Master's	1	56	1	0	0
	Manufacturing Engineering - Master's	1	43	1	0	0
	Systems Engineering - Bachelor's	1	47	0	0	1
Mechanical engineers	Mechanical Engineering - Bachelor's	2	236	1	0	1
	Mechanical Engineering - Master's	2	63	1	0	1
	Mechanical Engineering – Postbaccalaureate certificate	1	1	1	0	0
Physical therapists	Kinesiotherapy/Kinesiotherapist - Master's	1	13	0	0	1
	Physical Therapy/Therapist - Doctorate	4	34	2	1	1
Physician assistants	Physician Associate/Assistant - Master's	2	26	1	0	1
<i>Source: rpk GROUP analysis of NC Department of Commerce Employment Projections, 2021-2030 and IPEDS Completions Survey, 2017-2021.</i>						

The civil, mechanical, and industrial engineering programs produce the largest number of degrees across the competitors, along with law programs. While this signals that sizable programs already exist elsewhere in the state, the trend among degree completions in the engineering programs is largely positive, suggesting there is strong student demand. However, all the competitors offering law programs showed a negative trend in completions, suggesting weak student demand.

## Conclusion

The MDO analysis collectively shows that the majority of UNCG's academic programs are strongly or moderately aligned with expected employment opportunities in North Carolina over the next decade. And regardless of the employment outlook, 88% of UNCG programs are expected to provide students with access to occupations that offer above median wages. Programs with the strongest employment outlook are concentrated in Nursing, Business and Economics, and Computer Science. However, the School of Business and Economics, along with the School of Visual/Performing Arts, also offers multiple programs with poor employment prospects over the next decade.

An examination of programs offered by UNCG's competitors indicates that 30% of UNCG's programs are expected to offer strong market opportunities going forward, meaning the current competitor landscape is not currently saturated and there is evidence of student demand. The strongest opportunities for continued or increased investment in current UNCG programs are among the bachelor's degree program offerings, and particularly in the Schools of Business and Economics, and Education. The College of Arts and Sciences offers a variety of programs with strong and moderate market opportunities, but also houses the largest number of programs with weak market opportunities.

UNCG could consider adding new bachelor's degree programs in civil, industrial, and mechanical engineering to prepare students for these engineering jobs, which are projected to offer high wages and strong employment opportunities over the next decade. However, those new programs would be a significant investment for UNCG.



## **Appendix**

The goal of the MDO's **program analysis** is to determine how well programs currently offered at UNCG serve 1) the North Carolina state economy and 2) the student populations enrolled post-graduation. The MDO **gap analysis** uses the same information but examines it from a different perspective and identifies 1) the occupations offering the greatest well-paid employment opportunities in North Carolina over the next decade, and 2) whether UNCG currently offers programs to prepare students for those jobs.

The **competitor analysis** also examines the landscape outside of UNCG by looking at which other higher education competitor institutions may be offering similar academic programs and evaluating the comparative strength of those programs. This information 1) identifies programs in which UNCG may or may not have a competitive advantage, and 2) identifies potential areas of market growth or market saturation, which can inform decisions around investments in current or new academic programs.

### ***Program and Gap Analysis Methodology***

The MDO analysis uses publicly available employment projections and wage data and connects it to academic programs at UNCG using a CIP-SOC<sup>2</sup> crosswalk produced by the U.S. Department of Education (DOE). The publicly available CIP-SOC crosswalk provides the underlying framework for the MDO analysis. All occupations linked to UNCG program CIP codes come directly from the DOE's CIP-SOC crosswalk.

Accurate program CIP codes are critical to ensuring the MDO produces robust projections of the labor market opportunities available to program graduates. rpk GROUP reviewed the UNCG program names and CIP codes to identify potential mis-coded programs, and multiple degree programs with the same CIP code. Program descriptions and curriculums were then reviewed on UNCG's website, and in limited instances, rpk changed UNCG CIP codes used in the MDO analysis to better reflect the program content.

rpk GROUP created an enhanced version of the DOE's CIP-SOC crosswalk by adding information on the education and work experiences representative of each occupation. This information is produced by the U.S. Bureau of Labor Statistics (BLS). The enhanced crosswalk adds two important features to the MDO analysis. First, it prevents degree programs from matching to occupations that require significant work experience which new college graduates are unlikely to have (e.g., CEOs, CFOs, Legislators). Second, it improves the matching between degree programs and the education levels required in various occupations; it excludes CIP-SOC matches where there are wide disparities (e.g., bachelor's degree programs are not matched to occupations that require doctoral degrees, such as postsecondary teachers).

The employment and wage data are from North Carolina's Department of Commerce and the analysis metrics include: 2021-2030 projected new job growth, 2021-2030 projected average annual job openings, and 2021 median annual wages. The occupational wage data represents the median wage for all workers in an occupation; differential wages for workers employed in the same occupation but with varying levels of educational attainment are not available in the projections data.

The North Carolina occupational employment and wage data were attached to the enhanced CIP-SOC crosswalk by SOC code, and then the UNCG academic programs were attached by CIP code. The analyses were conducted at the six-digit

---

<sup>2</sup> 'CIP' codes are standard 'classification of instructional programs' codes assigned to each program. 'SOC' codes are 'standard occupational codes' assigned to all occupations. This analysis uses the current 2020 CIP codes and 2018 SOC codes.

CIP code and degree level (bachelor’s degree, postbaccalaureate certificate, master’s degree, post-master’s certificate, and doctorate degree).

*Liberal Arts Index*

rpk GROUP's Liberal Arts Index accounts for the varied employment opportunities available to liberal arts graduates and incorporated it into the custom CIP-SOC crosswalk. The method identifies ‘liberal arts’ programs, identifies jobs accessible to students with liberal arts degrees (see Table A1), and applies the index to all identified liberal arts programs at the bachelor’s degree award level (see Table A2).

**Table A1: rpk GROUP Liberal Arts Index Occupations (Bachelor’s Degrees)**

Advertising and promotions managers	Mental health counselors
Sales managers	Substance abuse, behavioral disorder, and mental health counselors
Administrative services managers	Mental health and substance abuse social workers
Education administrators, preschool and childcare center/program	Child, family, and school social workers
Education administrators, all other	Social workers, all other
Medical and health services managers	Health educators
Social and community service managers	Probation officers and correctional treatment specialists
Managers, all other	Community and social service specialists, all other
Agents and business managers of artists, performers, and athletes	Religious workers, all other
Buyers and purchasing agents	Arbitrators, mediators, and conciliators
Buyers and purchasing agents, farm products	Paralegals and legal assistants
Wholesale and retail buyers, except farm products	Legal support workers, all other
Purchasing agents, except wholesale, retail, and farm products	Career/technical education teachers, postsecondary
Compliance officers	Preschool teachers, except special education
Cost estimators	Kindergarten teachers, except special education
Human resources specialists	Elementary school teachers, except special education
Labor relations specialists	Middle school teachers, except special and career/technical education
Logisticians	Career/technical education teachers, middle school
Management analysts	Secondary school teachers, except special and career/technical education
Meeting, convention, and event planners	Career/technical education teachers, secondary school
Fundraisers	Adult basic education, adult secondary education, and English as a second language instructors
Compensation, benefits, and job analysis specialists	Teachers and instructors, all other, except substitute teachers
Training and development specialists	Substitute teachers, short-term
Market research analysts and marketing specialists	Teachers and instructors, all other
Business operations specialists, all other	Museum technicians and conservators
Property Appraisers and Assessors	Education instruction and library workers, all other
Appraisers and assessors of real estate	Fine artists, including painters, sculptors, and illustrators
Budget analysts	Special effects artists and animators
Credit analysts	Fashion designers
Financial analysts	Graphic designers
Personal financial advisors	Set and exhibit designers
Insurance underwriters	Designers, all other
Financial examiners	Actors
Credit counselors	Producers and directors
Loan officers	Coaches and scouts
Tax examiners and collectors, and revenue agents	Music directors and composers
Financial specialists, all other	Broadcast announcers and radio disc jockeys
Computer systems analysts	
Information security analysts	

Computer programmers Software developers Software quality assurance analysts and testers Web developers Database administrators Network and computer systems administrators Computer network support specialists Computer occupations, all other Operations research analysts Miscellaneous mathematical science occupations Mathematical science occupations, all other Foresters Geographers Forensic science technicians Substance abuse and behavioral disorder counselors Clergy Directors, religious activities, and education	News Analysts, Reporters, and Journalists Public relations specialists Editors Technical writers Writers and authors Interpreters and translators Broadcast technicians Sound engineering technicians Camera operators, television, video, and film Film and video editors Securities, commodities, and financial services sales agents Sales representatives, wholesale and manufacturing, technical and scientific products Sales engineers Proofreaders and copy markers Statistical assistants
--	--

**Table A2: UNCG Liberal Arts Bachelor’s Degree Programs**

African American and African Diaspora Studies Anthropology Art Arts Administration Classical Studies Communication Studies Dance (Choreography and Performance) Dance Studies Drama English Geography History Integrated Professional Studies Interior Architecture Languages, Literatures, and Cultures	Liberal and Interdisciplinary Studies Media Studies Music Peace and Conflict Studies Performance Philosophy Political Science Psychology Religious Studies Social Work Sociology Spanish Studio Art Women’s, Gender, and Sexuality Studies
--	---

***Competitor Analysis Methodology***

The competitor analysis includes institutions identified from UNCG-provided data originally obtained from the National Student Clearinghouse. Ten competitors were identified based on the number of students who applied and were accepted to UNCG but did not attend, and instead enrolled in other institutions. While not intentionally limited to North Carolina, UNCG’s largest competitors were located within the state (see Table A3).

The competitor analysis uses publicly available data on degrees and certificates awarded from the Integrated Postsecondary Education Data System (IPEDS). The data on competitor awards is connected to academic programs currently offered at UNCG, as well as programs identified in the gap analysis as potential opportunities for new program creation. The unit of analysis and the connection point between UNCG programs and competitor programs is the 6-digit CIP code plus the type of award (bachelor’s degree, postbaccalaureate certificate, master’s degree, post-master’s certificate, or doctoral/professional degree).

**Table A3: UNCG Competitor Analysis Institutions**

<b>UNCG Competitor Institutions</b>	<b>Number UNCG Applicants (Entering into the 2022 Cohort Year) Who Enrolled at Competitor Four-Year Institutions</b>
Appalachian State University	571
East Carolina University	522
Fayetteville State University	84
North Carolina Central University	123
North Carolina State University at Raleigh	564
University of North Carolina at Chapel Hill	980
University of North Carolina at Charlotte	420
University of North Carolina Wilmington	261
Western Carolina University	166
Winston-Salem State University	92

For each program, analysis metrics include market saturation and program demand calculated using 2018-2021 IPEDS degree and certificate awards data.

- Market Saturation = # institutions offering program/10
- Program Demand = Ratio of competitors offering the program demonstrating positive growth

Seventy of UNCG’s program offerings were not offered as competing programs by the 10 competitor institutions (see Table A4).

**Table A4: UNCG Academic Programs Without Competitor Data**

Analytical Instrumentation - Certificate Consumer, Apparel, and Retail Studies - Doctorate Global Fashion Industry Management - Certificate Retail Consumer Data Analytics - Certificate Retail Merchandising Management - Certificate Retail Studies - Master's Applied Statistics - Master's Athlete Well-Being - Certificate Chemistry and Biochemistry - Doctorate Synthetic Biology - Certificate Economics - Doctorate Leadership in Infant and Toddler Learning - Certificate Communication Sciences and Disorders - Doctorate Computational Mathematics - Doctorate Information Systems and Supply Chain Management - Bachelor's Information Technology Development - Certificate Information Technology Management - Certificate Special Endorsement in Computer Education - Certificate Dance - Certificate Dance - Master's Business Analytics - Certificate Dance Education - Master's Birth-Kindergarten Initial Licensure - Certificate Birth-Kindergarten Interdisciplinary Studies in Education and Development - Master's Quantitative Business Economics - Certificate	Human Development and Family Studies - Doctorate Genetic Counseling - Master's Informatics & Analytics - Master's Interior Architecture - Master's International Business - Master's Global Studies - Certificate Information Systems - Doctorate Advanced Materials - Certificate Medical Science - Certificate Music Education - Certificate Historical Keyboard Performance - Certificate Jazz Studies - Certificate Music - Doctorate Music Education - Doctorate Music Technology - Certificate Music Composition - Certificate Music Theory - Certificate Music Theory - Master's Music Theory Pedagogy - Certificate Ethnomusicology - Certificate Musicology - Certificate Advanced Practice Foundations - Certificate Nursing - Certificate Nursing - Master's Nursing Leadership and Management - Certificate Dietetic Internship - Certificate
--	--

Instructional Coaching - Certificate Interpreting, Deaf Education and Advocacy Services - Bachelor's Educational Assessment - Certificate Educational Research, Measurement, and Evaluation - Doctorate Educational Research, Measurement, and Evaluation - Master's e-Learning - Certificate Environmental Humanities - Certificate Kinesiology - Doctorate Historic Preservation - Certificate Human Development and Family Studies - Bachelor's	Nanoscience - Certificate Urban and Economic Development - Certificate Workplace Wellness - Certificate Languages, Literatures, and Cultures - Master's Cultural Foundations and Social Justice Education - Certificate Geography, Secondary Education - Bachelor's Climate Justice - Certificate Sustainability - Certificate Taxation - Certificate Women's, Gender, and Sexuality Studies - Master's
---	--

**From:** [Rick Staisloff](#)  
**To:** [Bob Shea](#)  
**Cc:** [Laura Reames](#);  
**Subject:** RE: UNCG - Progress Invoice 23-0053 - April - RPK GROUP  
**Date:** Tuesday, August 8, 2023 3:45:58 PM  
**Attachments:** [image001.png](#)

---

Bob,

We received the payment for our March invoice (Invoice 23-0036). Thank you.

As time allows, wanted to see if you could check on the status of our April invoice. Please let us know if you require any additional information to process this.

Regards,

Rick



Richard Staisloff | Senior Partner | [rpK GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

---

**From:** Rick Staisloff  
**Sent:** Monday, May 22, 2023 11:24 AM  
**To:** Bob Shea  
**Cc:** Laura Reames <[lreames@rpkgroup.com](mailto:lreames@rpkgroup.com)>;  
**Subject:** UNCG - Progress Invoice 23-0053 - April - RPK GROUP

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Attached please find our progress invoice for April.

Let me know if you have any questions, or require additional information to process this.

Regards,

Rick



# rpk GROUP

from mission to market

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626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

**From:** [Rick Staisloff](#)  
**To:** [Bob Shea](#)  
**Cc:** [Laura Reames](#);  
**Subject:** RE: UNCG - Progress Invoice 23-0053 - April - RPK GROUP  
**Date:** Tuesday, August 8, 2023 3:56:44 PM  
**Attachments:** [image001.png](#)  
[image002.png](#)

---

Much appreciated



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626C Admiral Drive, Suite 511, Annapolis, MD 21401  
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---

**From:** Bob Shea  
**Sent:** Tuesday, August 8, 2023 3:56 PM  
**To:** Rick Staisloff <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>  
**Cc:** Laura Reames <[lreames@rpkgroup.com](mailto:lreames@rpkgroup.com)>;  
**Subject:** RE: UNCG - Progress Invoice 23-0053 - April - RPK GROUP

I'm on it.            please birddog this and brief me.

**Bob Shea**  
**Vice Chancellor for Finance and Administration**  
**University of North Carolina Greensboro**  
**Mossman Building 254**



---

**From:** Rick Staisloff <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>  
**Sent:** Tuesday, August 8, 2023 3:46 PM  
**To:** Bob Shea  
**Cc:** Laura Reames <[lreames@rpkgroup.com](mailto:lreames@rpkgroup.com)>;  
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**From:**  
**To:** [Bob Shea](#); [Rick Staisloff](#)  
**Cc:** [Laura Reames](#)  
**Subject:** Re: UNCG - Progress Invoice 23-0053 - April - RPK GROUP  
**Date:** Tuesday, August 8, 2023 4:28:50 PM  
**Attachments:** [image002.png](#)  
[image003.png](#)

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Will do

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**From:** Bob Shea  
**Sent:** Tuesday, August 8, 2023 3:55 PM  
**To:** Rick Staisloff <rstaisloff@rpkgroup.com>  
**Cc:** Laura Reames <lreames@rpkgroup.com>;  
**Subject:** RE: UNCG - Progress Invoice 23-0053 - April - RPK GROUP

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**From:** [Rick Staisloff](#)  
**To:** [Bob Shea](#)  
**Subject:** Let's Catch Up  
**Date:** Thursday, August 10, 2023 3:29:49 PM  
**Attachments:** [image001.png](#)

---

Now that I'm back in the States, would like to catch up. Send me some dates/times that work for you.

Be well,

Rick

**rpk** GROUP  
from mission to market

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626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Project Update and Revised Market Analysis (for review)  
**Date:** Friday, August 11, 2023 10:25:58 AM  
**Attachments:** [Outlook-mvyhavrn.png](#)

---

Hi and Bob,

Short update this week, so no formal attachment for review. For your awareness:

- rpk will be sharing a short narrative to provide additional context to the financial tables. This was requested by Academic Deans as they work to ensure their constituents can understand the approach and how the tables can be informative.
- rpk will be meeting with UNCG IR on 8/14 to review the approach to the financial tables. This is in anticipation that IR will receive some questions related to the tables.
- In recognition of the official transfer of the academic dashboard to UNCG IR and the completed ASR work, I'll be turning off the [general project feedback form](#) next Friday (8/18)

Please let me know if you have any questions.

Thanks again,  
Mike Daly  
rpk GROUP

---

**From:** Mike Daly  
**Sent:** Friday, August 4, 2023 11:31 AM  
**To:** Bob Shea  
**Cc:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Subject:** UNCG/rpk Weekly Project Update and Revised Market Analysis (for review)

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Also attached is the revised Market Analysis narrative. I'd encourage your review and any needed discussions with us before sharing on the project's site.

Have a great weekend!

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Senior Associate | [rpkgroup](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

**From:**  
**To:** [Mike Daly](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Project Update and Revised Market Analysis (for review)  
**Date:** Friday, August 11, 2023 2:07:14 PM  
**Attachments:** [Outlook-mvyhavrn.png](#)

---

Thanks Mike. I spoke briefly with Katie.

I'd also appreciate a FAQ document to accompany the revenue/expense data. Please send early next week for our review before we post.

Also, might we replace the red/green color of arrows and just have the arrows up or down?

Thanks much and have a great weekend,

University of North Carolina Greensboro

Greensboro, NC 27412

---

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**Cc:** Katie Hagan <khagan@rpkgroup.com>  
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mdaly@rpkgroup.com | Cell: 518-796-2209

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**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Project Update and Revised Market Analysis (for review)  
**Date:** Friday, August 11, 2023 2:36:47 PM  
**Attachments:** [Outlook-mvyhavr.png](#)

---

Thanks,

Happy to accommodate both requests. I will work on getting those to you early next week.

Be well,  
Mike Daly  
rpk GROUP

Michael Daly | Senior Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: [518-796-2209](tel:518-796-2209)

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**To:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>; Bob Shea  
**Cc:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
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mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Mike Daly](#)  
**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Financial Data Table Updated and FAQ/Context Draft  
**Date:** Monday, August 14, 2023 1:56:48 PM  
**Attachments:** [Outlook-1xd1cqs.png](#)  
[UNCG Financial Tables Summary Draft20230814.docx](#)  
[UNCG Academic Cost and Revenue Analysis Public Table 8.14.2023.xlsx](#)

---

Hi ,

Attached is the revised (colors removed from arrows) financial tables. Also attached is a draft FAQ/context document for your review. After your review and any necessary changes, I'll send a final version for you to post on the project site.

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

**UNCG Financial Tables Summary – DRAFT**  
**August 13, 2023**

***What is the goal of the financial data tables?***

The financial tables model how UNCG can understand revenues and expenses associated with its academic units as related to student credit hour trends. In addition to the [academic data dashboard](#), this allows UNCG to have clarity on the level of resource utilization across the academic portfolio. While it is not expected that every department generates net revenue for the institution, UNCG can use this information to better understand how resources are being allocated in support of student and institutional success.

***What is the general methodology for these tables?***

The tables consist of financial data supplied by UNCG for the fiscal years 2020, 2021 and 2022<sup>1</sup>. The financial tables are limited to revenues and expenses specifically related to academic departments. Specifically, the following are included:

Expenses: Unrestricted expenses directly charged to academic departments are included.

Revenue: Tuition, course and program fees, scholarships/waivers, and state appropriations, included and are allocated to each department based on student credit hours.

The following are excluded:

Restricted, Auxiliary, Loan, Endowment, Agency, and Plant funds.

Unrestricted fund activity, such as academic administration and institutional administration, that is not directly assigned to academic departments.

***Why are restricted funds, like restricted research activity, excluded?***

Restricted dollars, including research that is funded from grants or external sources, are excluded on both the revenue and the expense side. Those funds are given to units within UNCG to accomplish specific goals and the revenues and expenses net to \$0 annually. Including the restricted expenses would artificially inflate the cost of operations for academic departments.

***What is the expense methodology?***

The tables include all unrestricted spending within a finance organization that is identified as an academic department, with the following exceptions:

**Included:**

Fund 112073-DNP Prog Tuition Differential is assigned to org 12801-Dean's Office – NU, which is not an academic department. After discussion with Dean, it was determined this should be included as a Nursing academic department expense, not a dean expense.

Expenses for the Joint School of Nanosci/Nanoeng includes org 13201-Dean's Office – NN and 13202-Nanoscience. Unlike other schools, faculty are assigned to the dean's office org as their home department in HR data as well as charged there in finance data. 13202-Nanoscience contains mostly operational expenses.

**Excluded:**

Differential tuition expense funds within the Bryan School. Per discussion with the Dean, they centralize most of those expenses and are not directly related to the instruction of their programs. Thus, these are not included in the analysis.

---

<sup>1</sup> Finance data sources: ODS Data Warehouse, cash basis

***Why were academic and university administration expenses excluded in the model?***

The goal of this model and these tables were to provide an understanding of resource utilization across the academic portfolio. Inclusion of expenses that occur outside of academic departments would have clouded that understanding and does not reflect the current resource allocation model at UNCG (academic departments are not 'taxed' or required to pay for the administrative functions of the university).

***How were tuition and fees (revenue) included in the model?***

Tuition revenue is collected centrally by the institution. Academic departments are allocated revenue from tuition based on their portion of undergraduate or graduate student credit hours produced. Fees associated with specific activity in departments (i.e., lab fees) are assigned directly to those departments.

***How were state appropriations included in the model?***

The UNC System's funding model provides revenue to institutions based on student credit hours generated from course subjects/academic disciplines. The appropriation from the system to UNCG is delivered centrally, and not to specific academic departments. These revenues are designed to offset UNCG's expenses. The financial tables are structured to ensure that the portion of revenue received by academic departments as a whole matches the portion of total expenses they incur. For the years of analysis direct department expenses range from 37%-38% of UNCG's total unrestricted expenses. Within the financial tables, for each department, revenues from tuition and fees and state revenues equal 37%-38% of UNCG's total revenue. The financial tables use the system's 2023 fiscal year funding formula to allocate state revenue to academic departments.

***Definitions***

Student Credit Hours: Data captured at Census 3; Where appropriate, certain course subjects were mapped to departments to match revenue with expenses. For example, MBA courses were mapped to an appropriate academic department vs their actual department, 'Dean's Office - BE'.

Net Tuition and Fees: All resident and non-resident tuition & academic fees (course/material fees) net of scholarships and discounts.

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Personnel Expenses: Employee (faculty, staff, and student) salaries/wages and benefits.

Nonpersonnel Expenses: All other purchased goods, services, and non-compensation expenses.

**From:**  
**To:** [Mike Daly](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Financial Data Table Updated and FAQ/Context Draft  
**Date:** Monday, August 14, 2023 4:01:19 PM  
**Attachments:** [Outlook-1xd1cqs.png](#)

---

Mike and Katie,  
Thank you. I will review tomorrow ( ) but has provided this feedback:

The Full Table and Condensed Table provides the 2020-22 percentage change in SCH and in "total expenses." Shouldn't the latter be "net revenue"? For example, it may not matter that a department's expenses have grown substantially if their revenue has grown even more.

Get [Outlook for iOS](#)

---

**From:** Mike Daly <mdaly@rpkgroup.com>  
**Sent:** Monday, August 14, 2023 1:56:36 PM  
**To:** Bob Shea  
**Cc:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** UNCG/rpk Financial Data Table Updated and FAQ/Context Draft

Hi ,

Attached is the revised (colors removed from arrows) financial tables. Also attached is a draft FAQ/context document for your review. After your review and any necessary changes, I'll send a final version for you to post on the project site.

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209



**From:** [Katie Hagan](#)  
**To:** ; [Mike Daly](#); [Bob Shea](#)  
**Subject:** Re: UNCG/rpk Financial Data Table Updated and FAQ/Context Draft  
**Date:** Monday, August 14, 2023 5:51:35 PM  
**Attachments:** [Outlook-1xd1lcqs.png](#)

---

Hi ,

Given that revenue growth is a function of SCH (revenue is allocated based on SCH), we thought expenses and SCH were a more appropriate comparison -- they also are the 'levers' that unit leaders have some level of control over.

Best,  
Katie

---

**From:**  
**Sent:** Monday, August 14, 2023 4:01 PM  
**To:** Mike Daly <mdaly@rpkgroup.com>; Bob Shea  
**Cc:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** Re: UNCG/rpk Financial Data Table Updated and FAQ/Context Draft

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**From:**  
**To:** [Mike Daly](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Financial Data Table Updated and FAQ/Context Draft  
**Date:** Tuesday, August 15, 2023 8:01:21 AM  
**Attachments:** [Outlook-1xd1cqs.png](#)

---

Hi all,

Thank you Mike. One suggestion is to add this paragraph....this will help alleviate concerns that we are not considering grant dollars in our comprehensive review.

***Why are restricted funds, like restricted research activity, excluded?***

Restricted dollars, including research that is funded from grants or external sources, are excluded on both the revenue and the expense side. Those funds are given to units within UNCG to accomplish specific goals and the revenues and expenses net to \$0 annually. Including the restricted expenses would artificially inflate the cost of operations for academic departments.

[Data on external awards and submissions, F&A \(Facilities and administrative costs\), faculty buy-outs, and research support for graduate and undergraduate students are provided by the Office of Research and Engagement and are posted here.](#)

University of North Carolina Greensboro

Greensboro, NC 27412

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**To:** ; [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Financial Data Table Updated and FAQ/Context Draft  
**Date:** Tuesday, August 15, 2023 1:25:17 PM  
**Attachments:** [Outlook-1xd1cgs.png](#)  
[UNCG Financial Tables FAQ 20230815.pdf](#)

---

Hi

Thanks for the review, the language you've provided has been included in the FAQ document. The revised, final version is attached and can be shared as you see fit.

I met with the UNCG IR team yesterday to answer their questions about the financial tables. Acknowledging the task they have to provide data to inform the rubric created by the Provost's Portfolio Review Taskforce, they are interested in having a working version of the model that can be updated. I appreciate their intentions and will support answering their questions but don't want to get ahead of you and Bob.

The last we spoke you and Bob were reviewing options related to the 'official UNCG owner(s)' of the financial model. Have you reached a decision? If so, we'd engage in that direction and provide an introduction to the model's working elements.

Thanks again,

Mike Daly

rpk GROUP

---

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**Sent:** Tuesday, August 15, 2023 8:01 AM  
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**UNCG Financial Tables  
Approach, Methodology, and Frequently Asked Questions  
August 15, 2023**

***What is the goal of the financial data tables?***

The financial tables model how UNCG can understand revenues and expenses associated with its academic units as related to student credit hour trends. In addition to the [academic data dashboard](#), this allows UNCG to have clarity on the level of resource utilization across the academic portfolio. While it is not expected that every department generates net revenue for the institution, UNCG can use this information to better understand how resources are being allocated in support of student and institutional success.

***What is the general methodology for these tables?***

The tables consist of financial data supplied by UNCG for the fiscal years 2020, 2021 and 2022<sup>1</sup>. The financial tables are limited to revenues and expenses specifically related to academic departments. Specifically, the following are included:

Expenses: Unrestricted expenses directly charged to academic departments are included.

Revenue: Tuition, course and program fees, scholarships/waivers, and state appropriations, included and are allocated to each department based on student credit hours.

The following are excluded:

Restricted, Auxiliary, Loan, Endowment, Agency, and Plant funds.

Unrestricted fund activity, such as academic administration and institutional administration, that is not directly assigned to academic departments.

***Why are restricted funds, like restricted research activity, excluded?***

Restricted dollars, including research that is funded from grants or external sources, are excluded on both the revenue and the expense side. Those funds are given to units within UNCG to accomplish specific goals and the revenues and expenses net to \$0 annually. Including the restricted expenses would artificially inflate the cost of operations for academic departments.

Data on external awards and submissions, F&A (Facilities and administrative costs), faculty buy-outs, and research support for graduate and undergraduate students are provided by the Office of Research and Engagement [and are posted here](#).

***What is the expense methodology?***

The tables include all unrestricted spending within a finance organization that is identified as an academic department, with the following exceptions:

**Included:**

Fund 112073-DNP Prog Tuition Differential is assigned to org 12801-Dean's Office – NU, which is not an academic department. After discussion with Dean, it was determined this should be included as a Nursing academic department expense, not a dean expense.

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[www.rpkgroup.com](http://www.rpkgroup.com)

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**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#)  
**Cc:** [Raven Moody](#)  
**Subject:** Background for Thursday Meeting  
**Date:** Monday, January 30, 2023 8:50:59 PM  
**Attachments:** [Example Finance Data Request.xlsx](#)

---

Hi Bob,

We are looking forward to connecting this week. As I mentioned last week, the key agenda items are confirming the data source and high-level approach for the financial analysis, as well as discussing the administrative services review.

I know some other folks are invited to the meeting on Thursday, and I assume it's due to their connection to financial data. If so, we'll plan to start with the academic financial analysis on the agenda. We'll discuss your goals for the analysis, existing efforts that are related to calculating net revenue or financial contribution of academic units, and outline the best path forward. An example file is attached that demonstrates the data we are looking to collect or ultimately connect into with the dashboard.

For the administrative services review component, we'd like to review organizational charts and identify key personnel for initial interviews to begin to develop an understanding of priorities and ideas for administrative efficiency improvements ([org charts available on the website](#) seem outdated and incomplete, so we'll need to collect current versions). After these initial interviews/conversations, we'll confer with you and Debbie to outline a path forward, which would include a survey of faculty and staff for additional ideas and opportunities, as well as deeper dives into the functions that are highest priority or are surfaced as having the most potential for savings impact.

Please let me know if this plan works for you, or if you have any questions before Thursday.

Best,  
Katie

**rp**k GROUP  
from mission to market

Katie Hagan | Principal | [rp](#)k GROUP

626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490

**From:** [Bob Shea](#)  
**To:** [Katie Hagan](#); [Kammy Jefferson](#); [Mike Daly](#)  
**Subject:** Re: Background for Thursday Meeting  
**Date:** Tuesday, January 31, 2023 10:14:51 AM  
**Attachments:** [2009 Bain Report Summary - Notes.pdf](#)  
[BAIN BRIEF The financially sustainable university \(1\).pdf](#)

---

Yes, the general plan looks good.

Yes, I've invited Paul Forte, my #2, the AVC for finance and Jennifer Leung, the budget director. Between the three of us, we should be able to answer any detailed questions you might have. Jennifer has 22 years experience in the UNC system and knows the idiosyncrasies of the system inside and out. Paul is the former AVC Finance at UNC Charlotte under Beth Hardin and was the CFO at App State for 5 years before I lured him here. He has about a decade's worth of UNC system knowledge. Oh by the way, I heard you are considering Sharon Bell from App. She is no longer at App for the same reason Paul left App, Beth Hardin left UNCC, Nick Long left Central Michigan, Harland Sands left Louisville and Cleveland State, and I left Elon. (more in private but higher ed has a structural problem in how it hires CEO's!). I've known Sharon for 15 years since our time together in RI where she was the controller at URI. Paul recruited her to App from URI. Sharon, Paul and I all worked together in RI. Sharon is a top tier human and finance pro.

I'll have Kammy Jefferson get you updated org charts. Most everyone here believes we have no fat to cut. I believe otherwise. In some places we have nowhere to cut, but in other spots we have opportunities. While at Elon, we operated in a much leaner way and from my time consulting at NACUBO, I know most publics run way more inefficiently than private ones. Our Faculty, EHRA and SHRA work rules make change challenging. Culture change is our biggest hurdle and that is from the chancellor's council all the way down to our most junior supervisors.

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### **Key Interviews**

Paul Forte, AVC Finance  
Sameer Kapileshwari, AVC Facilities  
Jeanne Madorin, AVC Human Resources  
Alan Boyette, Senior Vice Provost  
Donna Heath, VC Information Technology  
Tina McEntire, VC Enrollment Management  
Karen Blackwell, Head of IR  
Johnny Lail, data god in IR

I'm looking forward to working together and rpk helping us break the cultural dynamic of organizational inertia here. Not sure Debbie has told you this, but we fully anticipate some sort of vote of no confidence here during your engagement with us.

On Tue, Jan 31, 2023 at 8:00 AM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

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--

Thanks,

**Bob Shea**

Vice Chancellor for Finance and Administration

**University of North Carolina Greensboro**

Phone: 336-334-5200 Email: [r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)



**From:** [Katie Hagan](#)  
**To:** [Kammy Jefferson](#)  
**Cc:** [Bob Shea](#); [Mike Daly](#)  
**Subject:** Re: Background for Thursday Meeting  
**Date:** Thursday, February 2, 2023 3:11:53 PM

---

Thak you so much!

---

**From:** Kammy Jefferson <[kmwhite7@uncg.edu](mailto:kmwhite7@uncg.edu)>  
**Sent:** Thursday, February 2, 2023 8:01 AM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Cc:** Bob Shea <[r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)>; Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Subject:** Re: Background for Thursday Meeting

Hi Katie,

No problem, I wasn't sure how soon you needed them all, I was trying to get them to you as quickly as possible. I will definitely reach out to my equivalent in advancement to request a digital copy.

Advancement reports to VC Beth Fischer, and all VC's report to the Chancellor. Hope this helps.

I am working on obtaining ORG charts for the Chancellor's office as well.

Let me know if you have other questions.

On Thu, Feb 2, 2023 at 7:13 AM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Hi Kammy,

Thanks so much for getting all of these to us so quickly. I reviewed all of them yesterday and everything looks great, but the advancement one is difficult to read/follow given the color distortion that looks like happened when it was scanned in (the darker colored boxes require a significant zoom in to read). If it's possible for someone in advancement to update the digital version at some point in the coming weeks, that would be much appreciated. Also, where does advancement report? To the Chancellor?

Thank you,  
Katie

---

**From:** Kammy Jefferson <[kmwhite7@uncg.edu](mailto:kmwhite7@uncg.edu)>  
**Sent:** Wednesday, February 1, 2023 3:33 PM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Cc:** Bob Shea <[r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)>; Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>



**Subject:** Re: Background for Thursday Meeting

Good Afternoon,

Here are a few more, I am still collecting. University Advancement I edited myself using their website and some data that Bob provided me a bit ago.

On Tue, Jan 31, 2023 at 4:56 PM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Thanks so much for this additional information, and for the Bain reports, Bob! Looking forward to digging in more on Thursday.

Best,  
Katie

---

**From:** Bob Shea <[r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)>

**Sent:** Tuesday, January 31, 2023 10:14 AM

**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>; Kammy Jefferson <[kmwhite7@uncg.edu](mailto:kmwhite7@uncg.edu)>; Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>

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[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com) | 757-589-0490

--

Thanks,

**Bob Shea**

Vice Chancellor for Finance and Administration

**University of North Carolina Greensboro**

Phone: 336-334-5200 Email: [r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)



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Warmest regards,  
Kammy

[Kammy Jefferson](#)

[Assistant to Bob Shea, VC for Finance and Administration](#)

Executive Assistant to Paul Forte, AVC for Finance

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254 Mossman  
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**From:** [Kammy Jefferson](#)  
**To:** [Katie Hagan](#)  
**Cc:** [Bob Shea](#); [Mike Daly](#)  
**Subject:** Re: Background for Thursday Meeting  
**Date:** Wednesday, February 1, 2023 3:33:18 PM  
**Attachments:** [University Advancement 2023.pdf](#)  
[ORE FTE ORG Chart.pdf](#)  
[Provost Office Org Chart - 10101.pdf](#)  
[ITS Org Chart 1 1 2023.pdf](#)

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**Sent:** Tuesday, January 31, 2023 10:14 AM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>; Kammy Jefferson <[kmwhite7@uncg.edu](mailto:kmwhite7@uncg.edu)>; Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
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**Subject:** Re: Background for Thursday Meeting  
**Date:** Wednesday, February 1, 2023 4:08:16 PM  
**Attachments:** [EUC.pdf](#)  
[CPD.pdf](#)  
[CAP.pdf](#)  
[DOS.pdf](#)  
[HRL.pdf](#)  
[OLCE.pdf](#)  
[MAS.pdf](#)  
[OIE.pdf](#)  
[OARS.pdf](#)  
[Rec & Wellness.pdf](#)  
[SHS\\_2023.pdf](#)  
[Student Affairs.pdf](#)

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**To:** [Bob Shea](#)  
**Cc:** [Katie Hagan](#); [Mike Daly](#)  
**Subject:** Re: Background for Thursday Meeting  
**Date:** Tuesday, January 31, 2023 4:54:03 PM  
**Attachments:** [CE Org Chart January 2023.pdf](#)  
[Business Center Jan 2023.pdf](#)  
[POCAM Org Chart Jan 2023.pdf](#)  
[Spartan Printing Org Chart Jan 2023.pdf](#)  
[Sustainability Org Chart Jan 2023.pdf](#)

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**To:** [Kammy Jefferson](#); [Bob Shea](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Background for Thursday Meeting  
**Date:** Tuesday, January 31, 2023 4:55:07 PM

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email: [kmwhite7@uncg.edu](mailto:kmwhite7@uncg.edu)



"In order to succeed, we must first believe that we can."

Nikos Kazantzakis



**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#); [Kammy Jefferson](#); [Mike Daly](#)  
**Subject:** Re: Background for Thursday Meeting  
**Date:** Tuesday, January 31, 2023 4:56:03 PM

---

Thanks so much for this additional information, and for the Bain reports, Bob! Looking forward to digging in more on Thursday.

Best,  
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**From:** Bob Shea <r\_shea@uncg.edu>  
**Sent:** Tuesday, January 31, 2023 10:14 AM  
**To:** Katie Hagan <khagan@rpkgroup.com>; Kammy Jefferson <kmwhite7@uncg.edu>; Mike Daly <mdaly@rpkgroup.com>  
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Thanks,

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Vice Chancellor for Finance and Administration

**University of North Carolina Greensboro**

Phone: 336-334-5200 Email: [r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)



**From:** [Kammy Jefferson](#)  
**To:** [Katie Hagan](#)  
**Cc:** [Bob Shea](#); [Mike Daly](#)  
**Subject:** Re: Background for Thursday Meeting  
**Date:** Wednesday, February 1, 2023 5:03:36 PM  
**Attachments:** [Org Chart URO 2023 02 01.pdf](#)  
[Org Chart Enrollment Communications 2023 02 01.pdf](#)  
[Org Chart EM Division 2023 02 01.pdf](#)  
[Current Office of Financial Aid and Scholarships Org Chart January 2023.pdf](#)  
[10202 Org Chart 01.01.2023.pdf](#)

---

Hi All,

Enrollment Management for the final ones today.

Have a pleasant evening!

On Wed, Feb 1, 2023 at 4:08 PM Kammy Jefferson <[kmwhite7@uncg.edu](mailto:kmwhite7@uncg.edu)> wrote:

Hi All,

I was able to get Student Affairs as well, they are attached. Still waiting on others.

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Warmest regards,  
Kammy

[Kammy Jefferson](#)

[Assistant to Bob Shea, VC for Finance and Administration](#)

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[1202 Spring Garden Street](#)

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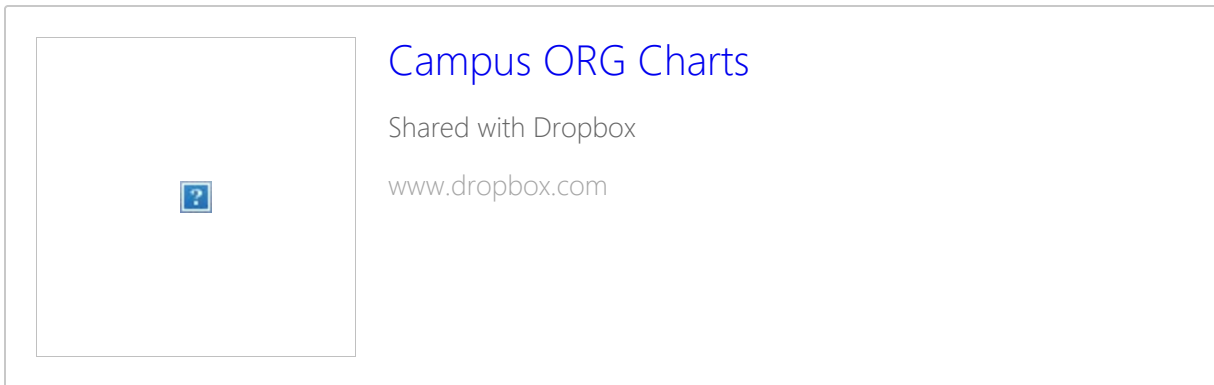
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**From:** [Katie Hagan](#)  
**To:** [Kammy Jefferson](#)  
**Cc:** [Bob Shea](#); [Mike Daly](#)  
**Subject:** Re: Background for Thursday Meeting  
**Date:** Thursday, February 2, 2023 5:20:22 PM

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Thanks so much, Kammy! I put this all in a Dropbox folder if it's easier for you to drop them in as you receive them:

<https://www.dropbox.com/scl/fo/dy21wpinmut1uyxkr9fho/h?dl=0&rlkey=pfjpkba65x776fgjwn1p91cp0>



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**Subject:** Re: Background for Thursday Meeting

Hey Katie,

I have received more detailed charts today. I have organized everything according to Division, if that makes sense, with some subfolders and files. So what I have sent you is included in this file as well, just organized within the proper folder.

I will have more in the coming days. Also, University Advancements Org chart has been updated.

On Thu, Feb 2, 2023 at 3:11 PM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Thak you so much!

---

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**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
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**Subject:** Re: Background for Thursday Meeting

Hi Katie,

No problem, I wasn't sure how soon you needed them all, I was trying to get them to you as quickly as possible. I will definitely reach out to my equivalent in advancement to request a digital copy.

Advancement reports to VC Beth Fischer, and all VC's report to the Chancellor. Hope this helps.

I am working on obtaining ORG charts for the Chancellor's office as well.

Let me know if you have other questions.

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Karen Blackwell, Head of IR  
Johnny Lail, data god in IR

I'm looking forward to working together and rpk helping us break the cultural dynamic of organizational inertia here. Not sure Debbie has told you this, but we fully anticipate some sort of vote of no confidence here during your engagement with us.

On Tue, Jan 31, 2023 at 8:00 AM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Hi Bob,

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Please let me know if this plan works for you, or if you have any questions before Thursday.

Best,  
Katie

**rpk** GROUP  
from mission to market

Katie Hagan | Principal | [rpK GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com) | 757-589-0490

--

Thanks,

**Bob Shea**

Vice Chancellor for Finance and Administration

**University of North Carolina Greensboro**

Phone: 336-334-5200 Email: [r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)



--

Warmest regards,  
Kammy

**Kammy Jefferson**

Assistant to Bob Shea, VC for Finance and Administration

Executive Assistant to Paul Forte, AVC for Finance

1202 Spring Garden Street

254 Mossman

Greensboro, NC 27402

Phone: 336-334-4053

email: [kmwhite7@uncg.edu](mailto:kmwhite7@uncg.edu)



"In order to succeed, we must first believe that we can."

Nikos Kazantzakis

**From:** [Kammy Jefferson](#)  
**To:** [Katie Hagan](#)  
**Cc:** [Bob Shea](#); [Mike Daly](#)  
**Subject:** Re: Background for Thursday Meeting  
**Date:** Thursday, February 2, 2023 8:01:03 AM

---

Hi Katie,

No problem, I wasn't sure how soon you needed them all, I was trying to get them to you as quickly as possible. I will definitely reach out to my equivalent in advancement to request a digital copy.

Advancement reports to VC Beth Fischer, and all VC's report to the Chancellor. Hope this helps.

I am working on obtaining ORG charts for the Chancellor's office as well.

Let me know if you have other questions.

On Thu, Feb 2, 2023 at 7:13 AM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Hi Kammy,

Thanks so much for getting all of these to us so quickly. I reviewed all of them yesterday and everything looks great, but the advancement one is difficult to read/follow given the color distortion that looks like happened when it was scanned in (the darker colored boxes require a significant zoom in to read). If it's possible for someone in advancement to update the digital version at some point in the coming weeks, that would be much appreciated. Also, where does advancement report? To the Chancellor?

Thank you,  
Katie

---

**From:** Kammy Jefferson <[kmwhite7@uncg.edu](mailto:kmwhite7@uncg.edu)>  
**Sent:** Wednesday, February 1, 2023 3:33 PM  
**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Cc:** Bob Shea <[r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)>; Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Subject:** Re: Background for Thursday Meeting

Good Afternoon,

Here are a few more, I am still collecting. University Advancement I edited myself using their website and some data that Bob provided me a bit ago.

On Tue, Jan 31, 2023 at 4:56 PM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Thanks so much for this additional information, and for the Bain reports, Bob! Looking forward to digging in more on Thursday.

Best,  
Katie

---

**From:** Bob Shea <[r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)>

**Sent:** Tuesday, January 31, 2023 10:14 AM

**To:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>; Kammy Jefferson <[kmwhite7@uncg.edu](mailto:kmwhite7@uncg.edu)>; Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>

**Subject:** Re: Background for Thursday Meeting

Yes, the general plan looks good.

Yes, I've invited Paul Forte, my #2, the AVC for finance and Jennifer Leung, the budget director. Between the three of us, we should be able to answer any detailed questions you might have. Jennifer has 22 years experience in the UNC system and knows the idiosyncrasies of the system inside and out. Paul is the former AVC Finance at UNC Charlotte under Beth Hardin and was the CFO at App State for 5 years before I lured him here. He has about a decade's worth of UNC system knowledge. Oh by the way, I heard you are considering Sharon Bell from App. She is no longer at App for the same reason Paul left App, Beth Hardin left UNCC, Nick Long left Central Michigan, Harland Sands left Louisville and Cleveland State, and I left Elon. (more in private but higher ed has a structural problem in how it hires CEO's!). I've known Sharon for 15 years since our time together in RI where she was the controller at URI. Paul recruited her to App from URI. Sharon, Paul and I all worked together in RI. Sharon is a top tier human and finance pro.

I'll have Kammy Jefferson get you updated org charts. Most *everyone* here believes we have no fat to cut. I believe otherwise. In some places we have nowhere to cut, but in other spots we have opportunities. While at Elon, we operated in a much leaner way and from my time consulting at NACUBO, I know most publics run way more inefficiently than private ones. Our Faculty, EHRA and SHRA work rules make change challenging. Culture change is our biggest hurdle and that is from the chancellor's council all the way down to our most junior supervisors.

I've already begun conversations to consider outsourcing custodial work. We already outsource food services and bookstore. Like many publics in NC we have two facilities staffs; one in Facilities and the other in Housing. Makes NO sense but it is a historical artifact of inefficient structures when resources were not constrained. I'm having a conversation this week with the UNC system chief of staff and VP for Risk and Public Safety on the possibility of centralizing/merging police dispatch staffs. Many system schools are having recruiting/retention problems for dispatchers and police. Centralization makes sense here. We have

211 secretarial positions. I think we could cut that number in half saving about 5 million annually. I think we could save utility expense if the system negotiated electricity for us; currently we all do that independently. NC has some interesting utility regulation which gives utilities near monopoly power. I owe you that cost reduction spreadsheet that Debbie and I have been using to discuss/influence/persuade the chancellor. Have you seen the Bain study that UNC CH had done a dozen or so years ago? Many good ideas in there. I found the summary, I'll track down the full report.

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--

Thanks,

**Bob Shea**

Vice Chancellor for Finance and Administration

**University of North Carolina Greensboro**

Phone: 336-334-5200 Email: [r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)



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**From:** [Bob Shea](#)  
**To:** [Katie Hagan](#); [Kammy Jefferson](#); [Mike Daly](#)  
**Subject:** Re: Background for Thursday Meeting  
**Date:** Tuesday, January 31, 2023 10:14:51 AM  
**Attachments:** [2009 Bain Report Summary - Notes.pdf](#)  
[BAIN BRIEF The financially sustainable university \(1\).pdf](#)

---

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Thanks,

**Bob Shea**

Vice Chancellor for Finance and Administration

**University of North Carolina Greensboro**

Phone: 336-334-5200 Email: [r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)



**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#); [Debbie Storrs](#)  
**Subject:** On Campus Tomorrow  
**Date:** Thursday, April 13, 2023 11:07:45 AM

---

**Caution:** This email originated from outside of UNCG. Do not click links or open attachments unless you recognize the sender.

Hi Bob and Debbie,

I'll be on campus tomorrow from 10am-12pm for the Chancellor's Task Force. I can come in earlier or stay a little later (just need to be heading back to Durham by 1:30), if there is anything you'd like to meet about.

Best,  
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from mission to market

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626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490

**From:** [Debbie Storrs](#)  
**To:** [Katie Hagan](#)  
**Cc:** [Bob Shea](#)  
**Subject:** Re: On Campus Tomorrow  
**Date:** Thursday, April 13, 2023 11:09:44 AM

---

I'm out tomorrow Katie - could you bring some examples of rubrics for my review and so I can share with the task force?

Thanks much!

Debbie

On Thu, Apr 13, 2023 at 11:07 AM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

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**From:** [Katie Hagan](#)  
**To:** [Debbie Storrs](#)  
**Cc:** [Bob Shea](#)  
**Subject:** Re: On Campus Tomorrow  
**Date:** Thursday, April 13, 2023 11:44:57 AM

---

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Enjoy your time away! Mike is working on some things for you re: the rubrics and I believe planning to send today. What he'll share is basically a compilation of what we've seen across the places we've worked with institutions on similar efforts. The reality is that these processes are not always public (typically handled behind a single sign on at most institutions) so there are relatively few public links to other processes to share. What most institutions have are a list of data points and a process outlined (e.g., task force reviews data and makes recommendations to the provost, provost makes recommendations to the chancellor, etc.) -- essentially what you've already created. The rubric stage is skipped due to the aversion to assigning a 'score' or 'rating' to programs and a desire to maintain some level of flexibility in the process to allow for qualitative input and mission prioritization.

I think our work in Vermont is among one of the only public frameworks for program decisions (p. 9), but I don't know that I'd classify it as a rubric: <https://www.vsc.edu/wp-content/uploads/2021/06/rpk-GROUP-Final-Report-to-the-Vermont-State-Colleges-System-Final-Version-REVISED-6-3-21.pdf>

---

**From:** Debbie Storrs <dastorrs@uncg.edu>  
**Sent:** Thursday, April 13, 2023 11:09 AM  
**To:** Katie Hagan <khagan@rpkgroup.com>  
**Cc:** Bob Shea <r\_shea@uncg.edu>  
**Subject:** Re: On Campus Tomorrow

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[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com) | 757-589-0490

**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Update and sample rubrics for Portfolio Review Taskforce  
**Date:** Thursday, April 13, 2023 2:23:31 PM  
**Attachments:** [Outlook-cwnui5cr.png](#)  
[Sample Rubrics for UNCG 2023.04.13.docx](#)  
[UNCG Weekly Project Update 2023.04.13.pdf](#)

---

**Caution:** This email originated from outside of UNCG. Do not click links or open attachments unless you recognize the sender.

Hi Debbie and Bob,

Attached is the weekly progress report for your review. Please let me know if you have any questions. Debbie, the final [academic program list referenced is available for review here.](#)

Also attached Debbie, are some sample rubrics for you to consider sharing with the PRTF. As Katie mentioned in another email there are very few such resources publicly available.

Thanks again,  
Mike Daly

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Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

### Sample Program Rubric A

This approach aims to develop cut scores for metrics (only a few metrics shown here, but could be expanded to include others), and programs are then categorized based on where they fall within the cut scores for the various metrics. This approach attempts to reduce the categorization to more of a math problem and remove as much subjectivity as possible but does present challenges with including qualitative measures that cannot be distilled as succinctly.

	Program Headcount	Program Growth	Degree Production	Other
<b>Sunset</b>	Fewer than 30	Declining or single digit-growth (3-year average)	Degree production below 10 (3-year average)	
<b>Monitor</b>	Fewer than 60	Declining or single digit-growth (3-year average)	Degree production below 20 (3-yr average)	All new programs

### Sample Program Rubric B

This approach does not set cut scores for metrics but allows the reviewers to look across all metrics and determine the appropriate placement of the program relative to the performance. This approach allows for some grey area and flexibility but puts reviewers in positions to make difficult decisions about the categorization because there are fewer 'rules' to fall back on.

	Definition	Metrics
<b>Grow</b>	A program with high student enrollment and/or demand and/or an area of emerging growth.	<ul style="list-style-type: none"> <li>• Low enrollment, defined as fewer than 10 students;</li> <li>• Declining enrollment for the previous four years;</li> <li>• Declining number of degrees or credentials conferred for the previous four years;</li> <li>• Low regional student demand, defined as 40th percentile or lower according to data;</li> <li>• Low regional market demand defined as 40th percentile or lower</li> </ul>
<b>Sustain</b>	A program that is performing well and the outlook is positive.	
<b>Fix</b>	A previously strong program that can be turned around.	
<b>Sunset</b>	Small or specialized programs with unfavorable student/market demand and limited growth potential.	

**From:** [Debbie Storrs](#)  
**To:** [Mike Daly](#)  
**Cc:** [Bob Shea](#); [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Update and sample rubrics for Portfolio Review Taskforce  
**Date:** Friday, April 14, 2023 6:54:31 AM  
**Attachments:** [Outlook-cwnui5cr.png](#)

---

Thanks Mike,  
I'll share the sample rubrics with the task force. I'm surprised there aren't others....I'll look at the link that Katie provided.

Best,  
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On Thu, Apr 13, 2023 at 2:21 PM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:

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**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#)  
**Cc:** [Bob Shea](#); [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Update and sample rubrics for Portfolio Review Taskforce  
**Date:** Friday, April 14, 2023 9:21:11 AM  
**Attachments:** [Outlook-cwnui5cr.png](#)

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Thanks, Debbie. Yes unfortunately, there aren't many others that are publicly available. This is partly due to the sensitive nature of these decisions and the rubrics being behind single-sign-on walls. It is also partly due to the fact that higher education has traditionally not stopped doing things, and there aren't many instances of the hard work of program review, outside of assessment, being done.

The first rubric that we shared is from work that [rpk GROUP did with the Vermont State College System](#).

The second rubric that we shared, because it was publicly available, is work [Kentucky's Council on Postsecondary Education is doing with some of its institutions](#).

If and as I encounter more rubrics that are available to share, I'll pass them along.

Have a great weekend,

Mike Daly

rpk GROUP

---

**From:** Debbie Storrs <dastorrs@uncg.edu>  
**Sent:** Friday, April 14, 2023 6:54 AM  
**To:** Mike Daly <mdaly@rpkgroup.com>  
**Cc:** Bob Shea <r\_shea@uncg.edu>; Katie Hagan <khagan@rpkgroup.com>  
**Subject:** Re: UNCG/rpk Weekly Update and sample rubrics for Portfolio Review Taskforce

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**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Draft Deck for 4/5 Presentation to Faculty Senate and notes for Academic Council  
**Date:** Monday, March 27, 2023 12:15:46 PM  
**Attachments:** [Outlook-ju2kv0d3.png](#)  
[UNCG rpk Faculty Senate Project Introduction and Update\\_Shared20230327.pdf](#)

---

Hi Debbie and Bob,

Attached is the draft presentation for the presentation to the Faculty Senate on April 5th. Please note that the timeline (slide 10) for Institutional Efficiencies and Service Improvement has been adjusted to allow time for the Chancellor's Taskforce to complete its work. We are targeting the presentation to the Faculty Senate at 10-12 minutes, leaving 18-20 minutes for discussion. Please review and let me know if you have any questions or comments by 3/31.

Debbie, Katie, and I will be at an internal retreat this Wednesday and unable to attend the Academic Council meeting. Below are bulleted updates for you to share as time permits.

#### *General Updates*

- rpk GROUP will be providing a project introduction and update to the Faculty Senate on April 5<sup>th</sup>. This will also be an opportunity for members of the Faculty Senate to ask questions and provide input.

#### *Academic Data Dashboards*

- The UNCG/rpk Data Team met on 2/23, 3/9, and 3/23.
  - Bi-weekly meetings of the Data team will occur throughout the duration of the project.
- Team members reviewed the scope and objectives of the project and were asked to review data templates provided by rpk.
  - UNCG IR's Department has facilitated the sharing of sample data sets from one semester for review by rpk and Data Team members and as reviewed, complete data sets.
- Provost's website details members of the UNCG/rpk Data Team as well as bi-weekly project updates and project FAQs.
  - <https://innovation.uncg.edu/initiatives/academic-data-dashboards-admin-services-review/>

#### *Administrative Services Review*

- Results from the survey requesting feedback on Administrative Services have been shared with the President's Sustainability Taskforce

Thanks again,  
Mike Daly

# rpk GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#); [Katie Hagan](#)  
**Cc:** [Bob Shea](#)  
**Subject:** Re: UNCG/rpk Draft Deck for 4/5 Presentation to Faculty Senate and notes for Academic Council  
**Date:** Monday, March 27, 2023 6:10:50 PM  
**Attachments:** [Outlook-ju2kv0d3.png](#)

---

Hi Debbie,

Thanks for the close read. I'll adjust the slides so they clearly share the academic years being included.

Thanks,  
Mike Daly  
rpk GROUP

Michael Daly | Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: [518-796-2209](tel:518-796-2209)

---

**From:** Debbie Storrs <dastorrs@uncg.edu>  
**Sent:** Monday, March 27, 2023 6:01:24 PM  
**To:** Katie Hagan <khagan@rpkgroup.com>  
**Cc:** Mike Daly <mdaly@rpkgroup.com>; Bob Shea <r\_shea@uncg.edu>  
**Subject:** Re: UNCG/rpk Draft Deck for 4/5 Presentation to Faculty Senate and notes for Academic Council

Thanks for the quick response Katie.  
Debbie

On Mon, Mar 27, 2023 at 5:55 PM Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)> wrote:

Hi Debbie,

We are going to use three years of data (2020, 2021, and 2022). This is due in large part to academic structure changes that happened between 2019 and 2020 that would require a lot of manual work to align 2019 with more recent years. In addition, when going to pull the financial data, the team encountered some challenges with 2019 that would take some time to resolve. Restricting to 2020-2022 will allow us to move more quickly, and 2023 should be able to be added fairly easily in the fall, so you'll have four years of data to inform any work that happens in the fall.

Best,  
Katie

---

**From:** Debbie Storrs <[dastorrs@uncg.edu](mailto:dastorrs@uncg.edu)>

**Sent:** Monday, March 27, 2023 5:20 PM

**To:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>

**Cc:** Bob Shea <[r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)>; Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>

**Subject:** Re: UNCG/rpk Draft Deck for 4/5 Presentation to Faculty Senate and notes for Academic Council

Thanks Mike,

I was under the impression we would have four years of data for both dept/program level data. The slide indicates it will only be two years, is that correct? I do not think that is sufficient for trend analysis.

I haven't had a chance to review the notes from the data meetings but can you help me understand why we have restricted it to two years?

Otherwise, looks fine to me. Thanks much!  
Debbie

On Mon, Mar 27, 2023 at 12:15 PM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:

Hi Debbie and Bob,

Attached is the draft presentation for the presentation to the Faculty Senate on April 5th. Please note that the timeline (slide 10) for Institutional Efficiencies and Service Improvement has been adjusted to allow time for the Chancellor's Taskforce to complete its work. We are targeting the presentation to the Faculty Senate at 10-12 minutes, leaving 18-20 minutes for discussion. Please review and let me know if you have any questions or comments by 3/31.

Debbie, Katie, and I will be at an internal retreat this Wednesday and unable to attend the Academic Council meeting. Below are bulleted updates for you to share as time permits.

#### *General Updates*

- rpk GROUP will be providing a project introduction and update to the Faculty Senate on April 5<sup>th</sup>. This will also be an opportunity for members of the Faculty Senate to ask questions and provide input.

#### *Academic Data Dashboards*

- The UNCG/rpk Data Team met on 2/23, 3/9, and 3/23.
  - Bi-weekly meetings of the Data team will occur throughout the duration of the project.
- Team members reviewed the scope and objectives of the project and were asked to review data templates provided by rpk.
  - UNCG IR's Department has facilitated the sharing of sample data sets from one semester for review by rpk and Data Team members and as reviewed, complete data sets.
- Provost's website details members of the UNCG/rpk Data Team as well as bi-weekly project updates and project FAQs.

<https://innovation.uncg.edu/initiatives/academic-data-dashboards-admin-services-review/>

*Administrative Services Review*

- Results from the survey requesting feedback on Administrative Services have been shared with the President's Sustainability Taskforce

Thanks again,  
Mike Daly

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**Cc:** [Bob Shea](#)  
**Subject:** Re: UNCG/rpk Draft Deck for 4/5 Presentation to Faculty Senate and notes for Academic Council  
**Date:** Monday, March 27, 2023 5:55:09 PM  
**Attachments:** [Outlook-ju2kv0d3.png](#)

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**Sent:** Monday, March 27, 2023 5:20 PM  
**To:** Mike Daly <mdaly@rpkgroup.com>  
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Mike Daly

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**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Project Update  
**Date:** Friday, May 19, 2023 10:56:08 AM  
**Attachments:** [Outlook-taltqgry.png](#)

---

Hi Debbie and Bob,

I'll hold on sharing the weekly project update until Monday as we have some meetings scheduled with Karen and Johnny later today that should clarify the path forward for the dashboards. Thanks again for facilitating our gathering yesterday, there's been great momentum out of the conversations already.

Thanks again,  
Mike Daly

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**From:** [Debbie Storrs](#)  
**To:** [Mike Daly](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Project Update  
**Date:** Friday, May 19, 2023 10:57:51 AM  
**Attachments:** [Outlook-taltqgry.png](#)

---

Thanks Mike - we'll skip Monday as Bob is traveling and unavailable. Happy to chat next week if there's anything pressing.

Thank you both for meeting yesterday and I look forward to hearing outcomes of the conversation.

p.s. Asked Dave Teachout and Andrew Hamilton to reach out to you and Johnny L. re: chair training. The communications to the chairs need to go out on Monday.

Debbie

---

**From:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Sent:** Friday, May 19, 2023 10:55 AM  
**To:** Debbie Storrs <[dastorrs@uncg.edu](mailto:dastorrs@uncg.edu)>; Bob Shea <[r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)>  
**Cc:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Subject:** UNCG/rpk Project Update

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Mike Daly

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[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

**From:** [Rick Staisloff](#)  
**To:** [Bob Shea](#)  
**Cc:** [Laura Reames](#); [Paul Forte](#)  
**Subject:** UNCG - Progress Invoice 23-0053 - April - RPK GROUP  
**Date:** Monday, May 22, 2023 11:24:53 AM  
**Attachments:** [image001.png](#)  
[UNCG - rpk GROUP - Progress Invoice 23-0053 - April 2023.pdf](#)

---

Bob,

Attached please find our progress invoice for April.

Let me know if you have any questions, or require additional information to process this.

Regards,

Rick

**rpk** GROUP  
from mission to market

Richard Staisloff | Senior Partner | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

# rpk GROUP

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Annapolis, MD 21401, United States  
Tel: 410-591-9018  
rstaisloff@rpkgroup.com  
www.rpkgroup.com

**rpk** GROUP  
from mission to market

## INVOICE

Robert Shea  
University of North Carolina-Greensboro  
1400 Spring Garden Ct  
Greensboro, NC 27412

TAX ID:  
INVOICE DATE: 5/15/2023  
INVOICE NO: 23-0053  
BILLING THROUGH: 4/30/2023

PROFESSIONAL SERVICES	HOURS	RATE	AMOUNT
Associate	186.00	\$350.000	\$65,100.00
Principal	20.50	\$450.000	\$9,225.00
Senior Associate	20.50	\$350.000	\$7,175.00
Senior Partner	1.00	\$450.000	\$450.00
<b>TOTAL SERVICES</b>	<b>228.00</b>		<b>\$81,950.00</b>
		<b>SUBTOTAL</b>	<b>\$81,950.00</b>
		<b>AMOUNT DUE THIS INVOICE</b>	<b>\$81,950.00</b>

This invoice is due on 6/14/2023

Richard Staisloff, Senior Partner  
rstaisloff@rpkgroup.com

Laura Reames, Billing Contact  
lreames@rpkgroup.com

Remit payment to:  
rpk GROUP  
626C Admiral Drive, Suite 511  
Annapolis, MD 21401

**From:** [Bob Shea](#)  
**To:** [Rick Staisloff](#)  
**Subject:** Re: UNCG - Progress Invoice 23-0053 - April - RPK GROUP  
**Date:** Monday, May 22, 2023 12:04:53 PM  
**Attachments:** [image001.png](#)

---

Got it.

Bob Shea

On May 22, 2023, at 8:24 AM, Rick Staisloff <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)> wrote:

Bob,

Attached please find our progress invoice for April.

Let me know if you have any questions, or require additional information to process this.

Regards,

Rick

<[image001.png](#)>

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<UNCG - rpk GROUP - Progress Invoice 23-0053 - April 2023.pdf>

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**Cc:** [Laura Reames](#); [Paul Forte](#)  
**Subject:** Re: UNCG - Progress Invoice 23-0053 - April - RPK GROUP  
**Date:** Monday, May 22, 2023 12:05:12 PM  
**Attachments:** [image001.png](#)

---

Ok to pay.

Bob Shea

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Bob,

Attached please find our progress invoice for April.

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Regards,

Rick

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<UNCG - rpk GROUP - Progress Invoice 23-0053 - April 2023.pdf>

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#); [Debbie Storrs](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Weekly update (two days late)  
**Date:** Tuesday, May 23, 2023 12:52:02 PM  
**Attachments:** [UNCG Weekly Project Update 2023.05.23.pdf](#)

---

Hi Bob and Debbie,

I hope your week is off to a great start. Attached is our weekly update from last week -- we delayed it a few days to give us an opportunity to update you on the changes that have happened since our conversation with you two, Johnny and Karen on Thursday, as well as the Chancellor's Task Force yesterday. We captured everything in the update, but here is a quick run down of where things stand:

1. The initial dashboard we created aimed to clean up some minor issues that are present in the data, particularly related to programs that are split across departments, departments that have credit hour activity but no faculty or financial data, and a few other things that are really normal when trying to do trend analyses and connect multiple data sources. Johnny and Karen believe this manual edit of the data causes replicability concerns and hinders their ability to respond to faculty questions about data, so we are unwinding all of that clean up work and the dashboards will reflect the data 'as is' from your systems. This is not a major lift on our part, but will require a bit of time to revise on our end and then we'll need to do some additional vetting with Karen, Johnny and others before it's ready for the Deans & other groups. We'll do our best to get all this done by end of next week. We'll also provide documentation to help users understand what might look 'off' due to the approach of representing the data as it is in the current systems.
2. UNCG IR would like to provide unit-level data for the program components of the dashboard (as opposed to summary data). Again, not a huge lift on our part, but our ability to meet the deadline of next week to have the dashboards done and ready depends on us getting that data from them this week.
3. Mike has still not heard from Andrew and Dave regarding scheduling workshops with chairs.
4. Mike is working with UNCG IR to plan and schedule the dashboard roll out to the data team, deans, and the provost's task force.
5. The Chancellor's Task Force work is complete, so we can now shift to determining how rpk can support some of that implementation work. I put some ideas in the attached document. **We do not meet with you all again until June 8, so please let me know if you want to set up a quick meeting between now and the end of next week so we can get moving on the administrative services effort.**



Best,  
Katie

**rpk** GROUP  
from mission to market

Katie Hagan | Principal | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490

UNCG



# UNCG & rpk GROUP

Status Report:  
May 23, 2023

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# Project Overview: May 15 – May 19

Overall Status	Project Status Overview & Key Items for Attention	
<b>On Track</b>		
Owner(s)	Accomplishments	Upcoming Activities
<b>rpk GROUP</b>	<ul style="list-style-type: none"> <li>Katie attended Chancellor’s Financial Sustainability Taskforce (5/12 &amp; 5/22).</li> <li>Rick met with Chancellor Gilliam (5/15).</li> <li>Mike met with Data Stewards to review data decisions to date (5/15).</li> <li>UNCG/rpk Data Team reviewed approach to faculty data and viewed data in dashboard (5/15).</li> <li>Coordinated with UNCG IR to utilize unit level record data for academic programs to avoid potential confusion with aggregated student success data.</li> <li>Coordinated with UNCG IR to structure dashboards using ‘current state’ of data; doing so may mask totality of some program enrollments if users select department filters.</li> </ul>	<ul style="list-style-type: none"> <li>Re-setting course and faculty data in dashboards to align with shared ‘current state’ of data</li> <li>Incorporating unit level record data into dashboards</li> <li>Sharing documented processes and procedures related to dashboard data with UNCG IR.</li> <li>Sharing draft “About this Dashboard” and applied use-cases for dashboard data with UNCG IR for review.</li> <li>UNCG/rpk Data Team meeting (6/1).</li> </ul>
<b>UNCG</b>	<ul style="list-style-type: none"> <li>UNCG IR shared test unit level record data</li> <li>Coordinated with rpk to utilize unit level record data for academic programs to avoid potential confusion with aggregated student success data.</li> <li>Coordinated with rpk to structure dashboards using ‘current state’ of data; doing so may mask totality of some program enrollments if users select department filters.</li> </ul>	<ul style="list-style-type: none"> <li>Scheduling opportunities for academic data dashboards as part of Chairs’ workshops and trainings.</li> </ul>

Key					
	Complete	On Track	At Risk	Off Track	Not Started

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete														
Dashboard Development																Complete	Complete	Complete	Complete	Complete	Complete	At Risk	At Risk								
Dashboards Shared with Deans																							Complete	Complete	Complete						
Dashboards Shared with Chairs																								Complete	Complete	Complete					
Dashboards Shared with Taskforce																								Complete	Complete	Complete	Complete				
Faculty Workshops										Complete	Complete	Complete	Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	

Due to the last-minute shift to unit-level records and a request to ‘unwind’ all data clean up that was done (per IR requests in meeting on 5/19), ability to meet this timeline will be dependent on receiving unit level records by 5/25 and will depend on the rpk and UNCG reviews of the dashboard output given the methodology shifts.

As of 5/23, Mike Daly has not heard from Andrew or Dave about scheduling the chairs workshops.

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
<b>Kick-off and Data Discovery</b>			Complete	Complete	Complete	Complete																									
<b>Data Collection &amp; Verification</b>						Complete	Complete	Complete	Complete																						
<b>Stakeholder Interviews &amp; Survey</b>						Complete	Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk														
<b>Final Report &amp; Recommendations</b>																				On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track

The work of the Chancellor’s Task Force is complete. Project leaders & rpk need to outline the goals for the final report and recommendations in light of the task force report. rpk’s suggestion is to move forward with two key analyses that will help the HR team begin their work around staffing restructure, which is the primary recommendation in the report:

1. Organizational structure review and shared services recommendations
2. Spans & layers analysis

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
UNCG/rpk Data Team meeting	Data Team members	6/1, 10:00am	
Project Leaders Meeting	Debbie, Bob, Katie and Mike	6/8, 9:00am	Review weekly project trackers

# Revised Timeline – Academic Data/Dashboards

Data	All Data Collected	Definitions and Methodology Confirmed	Data Validated	Beta Dashboard Launch and Feedback Period	Beta Dashboard Refined Based on Feedback
Academic Program List	3/24	4/18	4/27	6/5 – 6/30	7/3-7
Academic Structure	4/7	4/21	N/A		
Course Data	3/24	4/13	4/21		
Instructor Data	3/31	5/4	5/5		
Faculty Data	4/14	5/4	5/5		
Academic Program Data*	4/14	4/28	5/25		
Finance Data	3/24	5/19	5/26	TBD	TBD

\* See note on slide 4 re: academic program data.

Key	Complete	On Track	At Risk	Off Track	Not Started

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Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**From:** [Bob Shea](#)  
**To:** [Debbie Storrs](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Weekly update (two days late)  
**Date:** Wednesday, May 24, 2023 7:59:34 AM

---

Debbie,

I have concerns about 1 and 2. Unwinding the work of a consultant we've hired as subject matter experts worries me. I think we need to discuss with Karen and Johnny internally before we discuss with rpk. As much as I respect Karen and Johnny, I think they are wrong here. Who do we listen to, to decide; our internal folks or the external experts? rpk does this for a living. Our folks know the data, but not the strategy or urgency. I don't like that it appears a decision has been made without our input!

Next steps? I fear the unwinding is in process.

---

**From:** Katie Hagan <khagan@rpkgroup.com>  
**Date:** Tuesday, May 23, 2023 at 12:52 PM  
**To:** Bob Shea <r\_shea@uncg.edu>, Debbie Storrs <dastorrs@uncg.edu>  
**Cc:** Mike Daly <mdaly@rpkgroup.com>  
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**To:** [Katie Hagan](#); [Bob Shea](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Weekly update (two days late)  
**Date:** Wednesday, May 24, 2023 9:21:18 AM

---

All,

What I need is to ensure we (IT/IR) can replicate this process for the future AND that faculty and deans trust the data. Based on the discussion, I think what Katie has laid out is what we need to do to ensure this.

Happy to chat further,  
Debbie

---

**From:** Katie Hagan <khagan@rpkgroup.com>  
**Sent:** Wednesday, May 24, 2023 8:12 AM  
**To:** Bob Shea <R\_SHEA@uncg.edu>; Debbie Storrs <dastorrs@uncg.edu>  
**Cc:** Mike Daly <mdaly@rpkgroup.com>  
**Subject:** Re: Weekly update (two days late)

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**From:** Bob Shea <R\_SHEA@uncg.edu>  
**Sent:** Wednesday, May 24, 2023 8:01 AM  
**To:** Katie Hagan <khagan@rpkgroup.com>; Debbie Storrs <dastorrs@uncg.edu>  
**Cc:** Mike Daly <mdaly@rpkgroup.com>  
**Subject:** Re: Weekly update (two days late)

Has the unwinding already happened?

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**From:** Katie Hagan <khagan@rpkgroup.com>  
**Date:** Tuesday, May 23, 2023 at 12:52 PM

**To:** Bob Shea <r\_shea@uncg.edu>, Debbie Storrs <dastorrs@uncg.edu>

**Cc:** Mike Daly <mdaly@rpkgroup.com>

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khagan@rpkgroup.com | 757-589-0490

**From:** [Bob Shea](#)  
**To:** [Katie Hagan](#); [Debbie Storrs](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Weekly update (two days late)  
**Date:** Wednesday, May 24, 2023 8:01:06 AM

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**Date:** Tuesday, May 23, 2023 at 12:52 PM  
**To:** Bob Shea <r\_shea@uncg.edu>, Debbie Storrs <dastorrs@uncg.edu>  
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**To:** [Bob Shea](#); [Debbie Storrs](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Weekly update (two days late)  
**Date:** Wednesday, May 24, 2023 8:13:06 AM

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**From:** [Bob Shea](#)  
**To:** [Katie Hagan](#);  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Weekly update (two days late)  
**Date:** Wednesday, May 24, 2023 10:39:00 AM

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Thanks Katie.

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**From:** Katie Hagan <khagan@rpkgroup.com>  
**Date:** Wednesday, May 24, 2023 at 8:13 AM  
**To:** Bob Shea <R\_SHEA@uncg.edu>, Debbie Storrs <dastorrs@uncg.edu>  
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**From:** [Rick Staisloff](#)  
**To:** [Bob Shea](#)  
**Subject:** Cancel Meeting for May 25th  
**Date:** Wednesday, May 24, 2023 7:50:08 AM  
**Attachments:** [image001.png](#)

---

Since we were able to connect in advance of your flying out to San Diego, I'm assuming we'll cancel the 5/25 call Kammy set up.

Hope you had a great trip.

Rick

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Richard Staisloff | Senior Partner | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018



**From:** [Bob Shea](#)  
**To:** [Rick Staisloff](#)  
**Subject:** Re: Cancel Meeting for May 25th  
**Date:** Wednesday, May 24, 2023 9:58:45 AM  
**Attachments:** [image001.png](#)

---

Unless you want more witty conversation with me! Yup, I'm good, no need to chat tomorrow.

---

**From:** Rick Staisloff <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>  
**Date:** Wednesday, May 24, 2023 at 7:50 AM  
**To:** Bob Shea <[r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)>  
**Subject:** Cancel Meeting for May 25th

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**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Project Leaders Meeting - Agenda for 6/8  
**Date:** Tuesday, June 6, 2023 11:25:17 AM  
**Attachments:** [Outlook-sI0fcgeg.png](#)  
[UNCG MDO Memo Final\\_060123.pdf](#)

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Hi Debbie and Bob,

As discussed last week we'll use the majority of our time this Thursday to introduce Alan to the approach being considered for a direct net revenue analysis.

I've also attached the Market and Labor competition report for your review. This report utilizes publicly available data (labor market projections and degrees conferred) as a frame for understanding the position of UNCG's current academic portfolio. We can certainly schedule more time to discuss this report, as needed.

Debbie, I will be at the Deans retreat tomorrow (virtually) to discuss the academic data dashboard. At present, we are still waiting for validated data from UNCG IR so the dashboard may be limited to my screen-sharing. As data is finalized and shared we will provide direct access for the Deans.

Thanks again,  
Mike Daly

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Michael Daly | Senior Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
mdaly@rpkgroup.com | Cell: 518-796-2209

## Market Demand & Opportunity Analysis University of North Carolina Greensboro (UNCG)

June 1, 2023

The Market Demand and Opportunity (MDO) analysis is designed to provide forward-looking insight into the alignment between UNCG's current academic portfolio (all certificate and degree offerings) and expected employment opportunities in North Carolina over the next decade. The MDO analysis incorporates three different approaches to assess the alignment between UNCG's programs and projected labor market demand:

- **Program analysis** examines the labor market demand and wages for occupations that map to existing UNCG programs.
- **Competitor analysis** examines the strength of similar program offerings at other four-year competitor institutions in North Carolina.
- **Gap analysis** identifies growing occupations for which UNCG does not currently offer programs, and the competitor landscape surrounding the programs to prepare students for these jobs.

### ***Key highlights from these analyses show:***

- Two-thirds, or 121, of UNCG's academic programs are preparing students for occupations with a strong or moderate employment outlook and above median wages.
- Only about 20% of UNCG programs (39) have a weak employment outlook, but three-quarters of those programs (28) still prepare students for occupations with higher-than-median wages.
- The School of Nursing and the School of Business and Economics are most likely to offer programs (100% and 76%, respectively) that position graduates to access occupations with strong employment and wage opportunities.
- Programs with the weakest employment outlook are concentrated in the School of Music Department and the Consumer Apparel-Retail Studies Department in the School of Business and Economics.
- Thirty percent of UNCG's current programs (65) have a strong market position, with few competitor institutions offering similar programs, accompanied by evidence of robust student demand among the institutions that do offer those programs. In the Schools of Business and Economics and Education, more than 40% of the programs demonstrate a strong market position.
- Consideration for potential investment in new UNCG programs should include engineering (Civil, Industrial, and Mechanical) and programs that prepare students to work as Substance Abuse, Behavioral Disorder, and Mental Health Counselors. These high-wage occupations predict strong employment growth in North Carolina.

## North Carolina Statewide Employment Trends

North Carolina is projected to add 445,700 new jobs between 2021 and 2030, an increase of 9%. During this same period, more than 6.3 million job openings (705,600 annually) are projected from a combination of new job creation and workers leaving their current jobs as they exit the labor force or change occupations.

The fastest **new job growth** is in computer and mathematical occupations (21%) which includes college-level jobs, followed by healthcare support, personal care and service, and food preparation and serving occupations which primarily include non-college level jobs.

The greatest **number of job openings** over the next decade are expected in non-college level occupations, which tend to experience more worker turnover (see Figure 1). Among occupations with heavy concentrations of college-level jobs, those with the most job openings include management (36,400 annually), business and financial operations (36,000 annually), and educational instruction and library (30,400 annually).

### Program Analysis

The program analysis demonstrates how well UNCG's current academic programs serve the North Carolina state economy and the student populations enrolled post-graduation. In both the program and gap analyses, programs are organized into three employment categories:

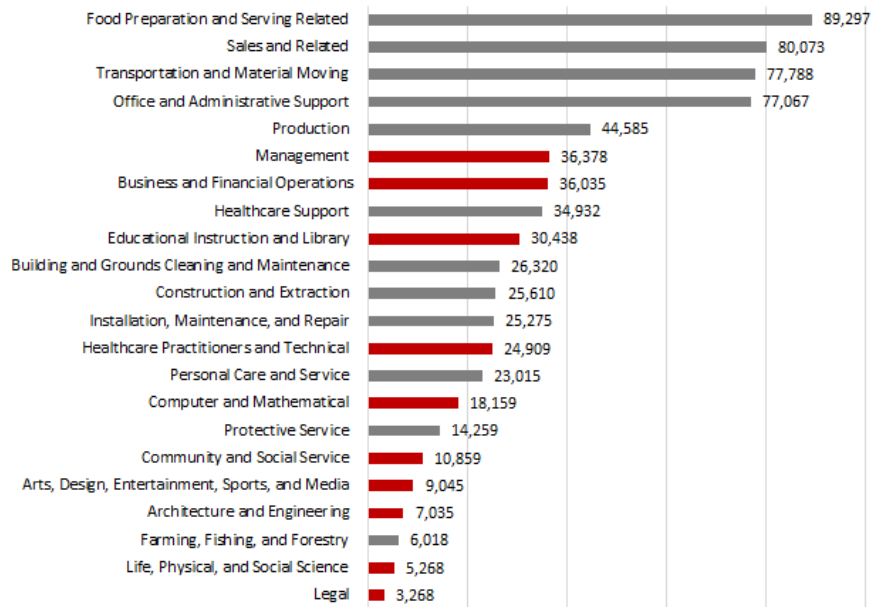
1. **Strong Employment Outlook** – at or above average new job growth *and* job openings
2. **Moderate Employment Outlook** - new job growth at or above average *and* below-average job openings **OR** below-average new job growth *and* job openings at or above average
3. **Weak Employment Outlook** - below average new job growth *and* below average job openings

and two wage areas:

1. **High Wage** - equal or exceeding the median annual wage
2. **Low Wage** - below median annual wage

Results from the program analysis show that the majority of UNCG's current academic programs (130 or 70%) have a strong or moderate employment outlook (see Table 1). These programs are equally distributed within these two employment outlook categories, and nearly all programs with strong employment outlook offer higher than median wages (34%), as do most programs with a moderate outlook (31%). Even programs with a weak employment outlook tend to offer high wages, but eight programs (4%) offer low wages and a weak employment outlook.

Figure 1: North Carolina Projected Annual Job Openings by Occupational Group, 2021-2030



Note: Red bars indicate the typical education level for that occupation includes a college degree.  
Source: rpk GROUP analysis of North Carolina Occupational Employment Projections, 2021-2030, North Carolina Department of Commerce.

**Table 1: Employment and Wage Outlook for UNCG Academic Programs**

Employment Outlook	Wage Category	Program Count	Program % Distribution
Strong Employment Outlook	High Wage	64	34%
	Low Wage	1	1%
<b>Strong Employment Outlook Total</b>		<b>65</b>	<b>35%</b>
Moderate Employment Outlook	High Wage	57	31%
	Low Wage	8	4%
<b>Moderate Employment Outlook Total</b>		<b>65</b>	<b>35%</b>
Weak Employment Outlook	High Wage	28	15%
	Low Wage	8	4%
	No Wage Category	3	2%
<b>Weak Employment Outlook Total</b>		<b>39</b>	<b>21%</b>
No Employment Category		17	9%
<b>No Employment Category Total</b>		<b>17</b>	<b>9%</b>
<b>Total</b>		<b>186</b>	<b>100%</b>
<b>Average New Job Growth in NC 9.1%   Average Annual Job Openings in NC 857   Median Annual Wage in NC \$47,745</b>			
<p>Note: The 'no employment category' includes 1) occupations without projections because they do not meet the North Carolina Department of Commerce's reporting threshold, or 2) occupations without a match in the Classification of Instructional Programs (CIP) – Standard Occupational Classification (SOC) crosswalk and a custom match could not be identified. All programs linked to the liberal arts index (occupations in which liberal arts graduates are often employed; see Appendix) are categorized as having a Strong Employment Outlook and High Wage; these programs are <b>not</b> included in this table.  <i>Source: rpk GROUP analysis of UNCG Academic Programs data and NC Department of Commerce Employment Projections, 2021-2030.</i></p>			

UNCG’s academic programs with the most promising employment outlook and high wages are found across six different colleges and at all award levels (See Table 2). Each of these programs prepares students for occupations where new job growth is projected to equal or exceed 25% and approximately 1,000 or more annual job openings.

Among the programs with the strongest outlook, bachelor’s and master’s degrees in **Computer Science** are linked to occupations where more than 10,000 job openings are expected annually. Master’s degrees in **Informatics & Analytics** and bachelor’s degrees in **Information Science** are both expected to provide access to occupations where more than 7,000 job openings are expected annually. Doctoral-level **Nursing** programs are preparing graduates for occupations projected to grow by 40% over the next decade and expected to offer about 1,100 job openings annually. Occupations tend to employ workers with different levels of educational preparation, so different degrees and certificates offered within similar programs may provide access to the same occupations. Differing education levels could lead to different levels of responsibility and wages earned within those occupations.

UNCG graduates with liberal arts degrees (see Appendix, Table A2) can also expect to find strong employment opportunities in North Carolina. rpk GROUP compiled an index of jobs where liberal arts graduates have been historically employed (see Appendix, Table A1). These occupations are collectively expected to grow 12.8% between 2021 and 2030 and offer 81,500 annual job openings, alongside above-median wages.

**Table 2: Top 10 UNCG Programs with Strong Employment Outlook and High Wages**

College/School	Department	Program	Award	Projected New Job Growth 2021-2030	Projected Average Annual Job Openings 2021-2030	Median Annual Wage 2021
Nursing	Nursing	Doctor of Nursing Practice	Doctorate	40%	1,103	\$94,458
Nursing	Nursing	Nursing	Doctorate	40%	1,103	\$94,458
Business and Economics	Consumer Apparel-Retail Studies	Global Apparel Supply Chain Management	Certificate	36%	969	\$63,640
Business and Economics	Info Systems and Supply Chain Management	Supply Chain Management	Certificate	36%	969	\$63,640
Interdisciplinary	Health Management	Health Management	Master's	32%	1,776	\$99,630
Arts and Sciences	Informatics and Analytics	Informatics & Analytics	Master's	29%	7,802	\$112,989
Education	Library & Information Science	Information Science	Bachelor's	28%	7,684	\$112,252
Arts and Sciences	Computer Science	Computer Science	Master's	27%	10,827	\$109,386
Arts and Sciences	Computer Science	Computer Science	Bachelor's	27%	11,241	\$107,781
Health and Human Sciences	Public Health Education	Community Health Education	Doctorate	25%	1,468	\$105,250
<p>Note: Programs aligned with occupations accessible to liberal arts graduates are not included in this table because none were in the top 10 ranking. Occupations may map to multiple programs because there are various degrees and programs that prepare students to access a particular occupation; in these instances, different programs may display the same employment and wage data.                      Source: rpk GROUP analysis of UNCG Academic Programs data and NC Department of Commerce Employment Projections, 2021-2030.</p>						

UNCG also offers several programs with weak employment and earnings prospects (see Table 3). These programs are concentrated in the College of **Visual/Performing Arts** and the School of **Business and Economics**. Employment opportunities for certificates, master's and doctoral degrees in **music, performance, and study** have below average job growth, annual openings, and wages. Similarly, the five programs offered in the department of **consumer apparel-retail studies** are preparing students across all degree levels for occupations with little expected growth.

**Table 3: UNCG Programs with Weak Employment Outlook and Low Wages**

College/School	Department	Program	Award	Projected New Job Growth 2021-2030	Projected Average Annual Job Openings 2021-2030	Median Annual Wage 2021
Visual/Performing Arts	School of Music	Music	Doctorate	8%	815	\$35,726
Visual/Performing Arts	School of Music	Performance	Master's	8%	815	\$35,726
Visual/Performing Arts	School of Music	Music Performance Study	Certificate	8%	529	\$ 14,442
Business and Economics	Consumer Apparel-Retail Studies	Consumer, Apparel, and Retail Studies	Bachelor's	1%	12	\$ 31,260
Business and Economics	Consumer Apparel-Retail Studies	Consumer, Apparel, and Retail Studies	Doctorate	1%	15	\$31,260
Business and Economics	Consumer Apparel-Retail Studies	Global Fashion Industry Management	Certificate	1%	12	\$31,260
Business and Economics	Consumer Apparel-Retail Studies	Retail Consumer Data Analytics	Certificate	1%	12	\$31,260
Business and Economics	Consumer Apparel-Retail Studies	Retail Studies	Master's	1%	12	\$31,260
<p>Note: Occupations may map to multiple programs because there are various degrees and programs that prepare students to access a particular occupation; in these instances, different programs may display the same employment and wage data.</p>						

As we look within individual UNCG schools, it's clear that all schools (except nursing) offer programs with strong, moderate, and weak employment outlooks (see Table 4). All **Nursing** school programs are well-positioned to prepare graduates for occupations with strong employment opportunities and high wages. The School of **Business and Economics** also offers a high concentration of programs (74%) with similarly strong employment growth and wages.

The College of **Visual/Performing Arts** offers programs with a variety of employment outlooks, but about 60% of their programs are linked to occupations with a weak employment outlook; even so, half of those programs still offer high wages. The Joint School of **Nanoscience/Nanoengineering** is the only college or school without programs linked to occupations with a strong employment outlook; three out of seven programs it offers have a weak employment outlook, although all programs are linked to occupations that offer higher than median wages.

**Table 4: Employment and Wage Outlook Distribution Across Colleges and Schools (Program Count & Distribution)**

Employment Outlook	Wage Category	Arts and Sciences	Visual/Performing Arts	Health and Human Sciences	Nanoscience / Nano-engineering	Business and Economics	Education	Nursing
Strong Employment Outlook	High Wage	18 (35%)	1 (4%)	5 (15%)		26 (74%)	6 (21%)	8 (100%)
	Low Wage			1 (3%)				
Moderate Employment Outlook	High Wage	20 (38%)	4 (17%)	15 (44%)	2 (29%)	1 (3%)	16 (55%)	
	Low Wage	1 (2%)	1 (4%)	6 (18%)				
Weak Employment Outlook	High Wage	7 (13%)	8 (35%)	3 (9%)	3 (43%)	2 (6%)	5 (17%)	
	Low Wage		3 (13%)			5 (14%)		
	No Wage Category		3 (13%)					
No Employment Category	No Wage Category	6 (12%)	3 (13%)	4 (12%)	2 (29%)	1 (3%)	2 (7%)	
<b>Total</b>		<b>52 (100%)</b>	<b>23 (100%)</b>	<b>34 (100%)</b>	<b>7 (100%)</b>	<b>35 (100%)</b>	<b>29 (100%)</b>	<b>8 (100%)</b>

Note: There are 188 total programs shown in this table because two programs are affiliated with more than one college/school.

Source: rpk GROUP analysis of UNCG Academic Programs data and NC Department of Commerce Employment Projections, 2021-2030.

## Competitor Analysis

The competitor analysis examines the market viability and opportunity of the academic programs currently offered by UNCG. Information from the National Student Clearinghouse was used to identify UNCG's 10 largest competitor institutions, all of which are located in North Carolina (see Appendix, Table A3). By connecting competitor program awards to similar programs at UNCG, the market saturation (number of competitors offering the program) and program demand (competitor growth in degree and certificates awarded) can be assessed within the competitor space. Programs are organized into three categories informed by market saturation and competitor growth in degree and certificate awards:

1. **Strong Market Opportunity** - below 50% market saturation & at least 50% of competitors offering the program demonstrate positive growth



2. **Moderate Market Opportunity** - below 50% market saturation & less than 50% of competitors offering the program demonstrate positive growth **OR** Above 50% market saturation & at least 50% of competitors offering the program demonstrate positive growth
3. **Limited Market Opportunity** - above 50% market saturation & less than 50% of competitors offering the program demonstrate positive growth

Results from the competitor analysis show that 30% of UNCG’s current programs are strongly positioned to take advantage of market opportunities, with anticipated student interest and few offerings among competitor institutions (see Table 5). Two-thirds of these programs offer bachelor’s degree (11%) or postbaccalaureate certificates (9%). Another quarter of UNCG’s programs indicate moderate market opportunities, with most at the bachelor’s (11%) and master’s (9%) degree levels. Only 11% of UNCG’s programs are expected to have limited market opportunity because of strong competition or limited visible demand among the university’s competitors.

**Table 5: Market Opportunity for UNCG Academic Programs**

Market Opportunity	Award	Program Count	Program % Distribution
Strong Market Opportunity	Bachelor's	23	11%
	Postbaccalaureate certificate	20	9%
	Master's	14	7%
	Doctorate	8	4%
<b>Strong Market Opportunity Total</b>		<b>65</b>	<b>30%</b>
Moderate Market Opportunity	Bachelor's	24	11%
	Postbaccalaureate certificate	3	1%
	Master's	19	9%
	Post-master's certificate	1	0%
	Doctorate	9	4%
<b>Moderate Market Opportunity Total</b>		<b>56</b>	<b>26%</b>
Limited Market Opportunity	Bachelor's	14	7%
	Master's	9	4%
<b>Limited Market Opportunity Total</b>		<b>23</b>	<b>11%</b>
No Competitor Data	Bachelor's	4	2%
	Postbaccalaureate certificate	39	18%
	Master's	14	7%
	Post-master's certificate	3	1%
	Doctorate	11	5%
<b>No Competitor Data Total</b>		<b>71</b>	<b>33%</b>
<b>Total</b>		<b>215</b>	<b>100%</b>

Note: 'No Competitor Data' indicates a competitor could offer the program, but completions are <1 across FY18 – FY21; alternately, competitors may classify a similar program using a different CIP code.  
Source: rpk GROUP analysis of IPEDS Completions Survey, 2018-2021.

In the School of **Business and Economics** more than 40% of the programs are expected to have a strong market position (see Table 6). In addition, 30% or more of programs offered in the College of **Arts and Sciences**, Schools of **Health and Human Sciences, Education**, and Joint School of **Nanoscience/Nanoengineering** are strongly positioned to serve student

interested in the current market environment. The Colleges of **Arts and Sciences**, offers the greatest number of programs (12, or 17%) with the limited market opportunities because of low student demand or strong existing competition.

**Table 6: Market Opportunity Distribution Across Colleges and Schools (Program Count and Distribution)**

Market Opportunity	Arts and Sciences	Visual/ Performing Arts	Health and Human Sciences	Nanoscience / Nano-engineering	Business and Economics	Education	Nursing
Strong Market Opportunity	21 (30%)	3 (10%)	13 (36%)	2 (29%)	15 (43%)	11 (38%)	
Moderate Market Opportunity	23 (32%)	10 (32%)	11 (31%)		4 (11%)	6 (21%)	3 (38%)
Limited Market Opportunity	12 (17%)	3 (10%)	1 (3%)		2 (6%)	4 (14%)	1 (13%)
No Competitor Data	15 (21%)	15 (48%)	11 (31%)	5 (71%)	14 (40%)	8 (28%)	4 (50%)
<b>Total</b>	<b>71 (100%)</b>	<b>31 (100%)</b>	<b>36 (100%)</b>	<b>7 (100%)</b>	<b>35 (100%)</b>	<b>29 (100%)</b>	<b>8 (100%)</b>

Note: 'No Competitor Data' indicates competitors could offer a program, but awards are <1 across FY18 – FY21; alternately, competitors may use a different CIP code to classify a similar program. There are 217 total programs shown in this table because two programs are affiliated with more than one college/school.  
 Source: rpk GROUP analysis of IPEDS Completions Survey, 2018-2021.

### Gap Analysis

The gap analysis takes a statewide perspective on employment growth. It looks to identify occupations where strong or moderate job growth is expected in North Carolina, but UNCG does not offer any programs preparing students for those jobs. The gap analysis highlights areas of consideration for potential academic program development.

The gap analysis reveals eight occupations at various degree levels that could be candidates for program consideration (see Table 7). The occupations are centered in **health care, engineering,** and the **legal field**. Development of these programs may require creating new colleges, schools, or departments since few are aligned with existing UNCG schools.

**Table 7: Occupations with Strong/Moderate Employment Outlook, High Wages, and No Affiliated UNCG Program**

Occupation Code (SOC)	Occupation	Typical Educational Requirement	Projected New Job Growth 2021-2030	Projected Average Annual Job Openings 2021-2030	Median Annual Wage 2021
29-1071	Physician Assistants	Master's	29%	624	\$107,330
21-1018	Substance Abuse, Behavioral Disorder, and Mental Health Counselors	Bachelor's	24%	1,349	\$48,640
29-1123	Physical Therapists	Doctoral/ Professional	19%	532	\$79,240
17-2112	Industrial Engineers	Bachelor's	16%	818	\$81,380
17-2051	Civil Engineers	Bachelor's	14%	1,107	\$78,960
17-2141	Mechanical Engineers	Bachelor's	12%	711	\$79,570
23-1011	Lawyers	Doctoral/ Professional	11%	1,133	\$105,140
29-2010	Clinical Laboratory Technologists and Technicians	Bachelor's	9%	1,077	\$48,000

Note: Table includes high-wage occupations with a strong employment outlook, and high-wage occupations with a moderate employment outlook where new job growth is above average and annual job openings are greater than 500. Occupations accessible with a liberal arts degree are excluded from this table.  
 Source: rpk GROUP analysis of UNCG Academic Programs data and NC Department of Commerce Employment Projections, 2021-2030.

In the health field, **Physician Assistants** and **Physical Therapists** both require graduate-level programs, while **Clinical Laboratory Technologists and Technicians** typically earn bachelor’s degrees. **Substance Abuse, Behavioral Disorder, and Mental Health Counselors** are other health-related occupations requiring bachelor’s degrees.

Within engineering, **Civil and Mechanical Engineers** are expected to offer strong employment opportunities and require only bachelor’s degree programs. While **Lawyers** will have similar opportunities, preparing students for those opportunities would require the creation of a post-graduate professional school.

**Table 8: Competitor Analysis for Areas Identified as UNCG Program Gaps**

Occupation	Programs Linked to Occupation	UNCG Competitors Offering the Program	Average Awards per Year	Number of Competitors by Growth Trend 2017-2021		
				Positive	None	Negative
<b>Strong Employment Outlook</b>						
Civil engineers	Civil Engineering, General - Bachelor's	2	118	2	0	0
	Civil Engineering, General - Master's	2	41	2	0	0
	Construction Engineering - Bachelor's	1	16	0	1	0
	Construction Engineering - Master's	1	4	1	0	0
Clinical laboratory technologists and technicians	Clinical Laboratory Science/Medical Technology/Technologist - Bachelor's	3	25	2	0	1
	Clinical Laboratory Science/Medical Technology/Technologist - Master's	1	5	0	0	1
Lawyers	Law – Doctorate/Professional	2	162	0	0	2
	Programs for Foreign Lawyers - Master's	1	2	0	0	1
Substance abuse, behavioral disorder, and mental health counselors	Mental Health Counseling/Counselor - Master's	2	24	1	0	1
	Substance Abuse/Addiction Counseling – Postbaccalaureate certificate	3	8	2	1	0
	Trauma Counseling - Postbaccalaureate certificate	1	5	1	0	0
<b>Moderate Employment Outlook</b>						
Industrial engineers	Engineering/Industrial Management - Bachelor's	1	15	1	0	0
	Engineering/Industrial Management - Master's	2	20	1	0	1
	Industrial Engineering - Bachelor's	1	92	1	0	0
	Industrial Engineering - Master's	1	56	1	0	0
	Manufacturing Engineering - Master's	1	43	1	0	0
	Systems Engineering - Bachelor's	1	47	0	0	1
Mechanical engineers	Mechanical Engineering - Bachelor's	2	236	1	0	1
	Mechanical Engineering - Master's	2	63	1	0	1
	Mechanical Engineering – Postbaccalaureate certificate	1	1	1	0	0
Physical therapists	Kinesiotherapy/Kinesiotherapist - Master's	1	13	0	0	1
	Physical Therapy/Therapist - Doctorate	4	34	2	1	1
Physician assistants	Physician Associate/Assistant - Master's	2	26	1	0	1
<i>Source: rpk GROUP analysis of NC Department of Commerce Employment Projections, 2021-2030 and IPEDS Completions Survey, 2017-2021.</i>						

This analysis also considered other state colleges and universities that may already offer programs preparing students for these jobs. It includes the same ten institutions included in the competitor analysis (see Appendix, Table A3). The data show that very few UNCG competitors, generally one or two institutions, offer the programs that will prepare students for these growing occupations. Only one program, a physical therapist doctoral degree, was offered by almost half of the competitor institutions (see Table 8).

The **civil, mechanical, and industrial engineering** programs produce the largest number of degrees across the competitors, along with **law** programs. While this signals that sizable programs already exist elsewhere in the state, the trend among degree completions in the engineering programs is largely positive, suggesting there is strong student demand. However, all the competitors offering law programs showed a negative trend in completions, suggesting weak student demand.

Six competitors offer programs preparing students for jobs as **Substance Abuse, Behavioral Disorder, and Mental Health Counselors**. They produce fewer graduates, but the positive trend in degree production for these programs suggests opportunity may be available in the higher education marketplace for more programs.

## Conclusion

The MDO analysis collectively shows that the majority of UNCG's academic programs are strongly or moderately aligned with expected employment opportunities in North Carolina over the next decade. And regardless of the employment outlook, 88% of UNCG programs are expected to provide students with access to occupations that offer above median wages. Programs with the strongest employment outlook are concentrated in Nursing, Business and Economics, and Computer Science. However, the School of Business and Economics, along with the School of Visual/Performing Arts, also offers multiple programs with poor employment prospects over the next decade.

An examination of programs offered by UNCG's competitors indicates that 30% of UNCG's programs are expected to offer strong market opportunities going forward, meaning the current competitor landscape is not currently saturated and there is evidence of student demand. The strongest opportunities for continued or increased investment in current UNCG programs are among the bachelor's degree program offerings, and particularly in the Schools of Business and Economics, and Education. The College of Arts and Sciences offers a variety of programs with strong and moderate market opportunities, but also houses the largest number of programs with weak market opportunities.

UNCG could consider adding new bachelor's degree programs in civil, industrial, and mechanical engineering to prepare students for these engineering jobs, which are projected to offer high wages and strong employment opportunities over the next decade. However, those new programs would be a significant investment for UNCG. New bachelor's degree programs preparing students for jobs as Substance Abuse, Behavioral Disorder, and Mental Health Counselors may also warrant consideration.

## Appendix

The goal of the MDO’s **program analysis** is to determine how well programs currently offered at UNCG serve 1) the North Carolina state economy and 2) the student populations enrolled post-graduation. The MDO **gap analysis** uses the same information but examines it from a different perspective and identifies 1) the occupations offering the greatest well-paid employment opportunities in North Carolina over the next decade, and 2) whether UNCG currently offers programs to prepare students for those jobs.

The **competitor analysis** also examines the landscape outside of UNCG by looking at which other higher education competitor institutions may be offering similar academic programs and evaluating the comparative strength of those programs. This information 1) identifies programs in which UNCG may or may not have a competitive advantage, and 2) identifies potential areas of market growth or market saturation, which can inform decisions around investments in current or new academic programs.

### **Program and Gap Analysis Methodology**

The MDO analysis uses publicly available employment projections and wage data and connects it to academic programs at UNCG using a crosswalk. The employment and wage data are from North Carolina’s Department of Commerce and the analysis metrics include: 2021-2030 projected new job growth, 2021-2030 projected average annual job openings, and 2021 median annual wages. rpk GROUP created an enhanced version of the Department of Education’s CIP-SOC<sup>1</sup> crosswalk, integrating occupational education and experience requirements from the Bureau of Labor Statistics.

The North Carolina occupations and the associated employment and wage data were attached to the crosswalk by SOC code, and then the UNCG academic programs were attached by CIP code. The analyses were conducted at the six-digit CIP code and degree type (bachelor’s degree, postbaccalaureate certificate, master’s degree, post-master’s certificate, and doctorate degree).

### *Liberal Arts Index*

rpk GROUP's Liberal Arts Index accounts for the varied employment opportunities available to liberal arts graduates and incorporated it into the custom CIP-SOC crosswalk. The method identifies ‘liberal arts’ programs, identifies jobs accessible to students with liberal arts degrees (see Table A1), and applies the index to all identified liberal arts programs at the bachelor’s degree award level (see Table A2).

**Table A1: rpk GROUP Liberal Arts Index Occupations (Bachelor’s Degrees)**

Advertising and promotions managers	Mental health counselors
Sales managers	Substance abuse, behavioral disorder, and mental health counselors
Administrative services managers	Mental health and substance abuse social workers
Education administrators, preschool and childcare center/program	Child, family, and school social workers
Education administrators, all other	Social workers, all other
Medical and health services managers	Health educators
Social and community service managers	Probation officers and correctional treatment specialists
Managers, all other	Community and social service specialists, all other

<sup>1</sup> ‘CIP’ codes are standard ‘classification of instructional programs’ codes assigned to each program. ‘SOC’ codes are ‘standard occupational codes’ assigned to all occupations. This analysis uses the current 2020 CIP codes and 2018 SOC codes.

Agents and business managers of artists, performers, and athletes Buyers and purchasing agents Buyers and purchasing agents, farm products Wholesale and retail buyers, except farm products Purchasing agents, except wholesale, retail, and farm products Compliance officers Cost estimators Human resources specialists Labor relations specialists Logisticians Management analysts Meeting, convention, and event planners Fundraisers Compensation, benefits, and job analysis specialists Training and development specialists Market research analysts and marketing specialists Business operations specialists, all other Property Appraisers and Assessors Appraisers and assessors of real estate Budget analysts Credit analysts Financial analysts Personal financial advisors Insurance underwriters Financial examiners Credit counselors Loan officers Tax examiners and collectors, and revenue agents Financial specialists, all other Computer systems analysts Information security analysts Computer programmers Software developers Software quality assurance analysts and testers Web developers Database administrators Network and computer systems administrators Computer network support specialists Computer occupations, all other Operations research analysts Miscellaneous mathematical science occupations Mathematical science occupations, all other Foresters Geographers Forensic science technicians Substance abuse and behavioral disorder counselors Clergy Directors, religious activities, and education	Religious workers, all other Arbitrators, mediators, and conciliators Paralegals and legal assistants Legal support workers, all other Career/technical education teachers, postsecondary Preschool teachers, except special education Kindergarten teachers, except special education Elementary school teachers, except special education Middle school teachers, except special and career/technical education Career/technical education teachers, middle school Secondary school teachers, except special and career/technical education Career/technical education teachers, secondary school Adult basic education, adult secondary education, and English as a second language instructors Teachers and instructors, all other, except substitute teachers Substitute teachers, short-term Teachers and instructors, all other Museum technicians and conservators Education instruction and library workers, all other Fine artists, including painters, sculptors, and illustrators Special effects artists and animators Fashion designers Graphic designers Set and exhibit designers Designers, all other Actors Producers and directors Coaches and scouts Music directors and composers Broadcast announcers and radio disc jockeys News Analysts, Reporters, and Journalists Public relations specialists Editors Technical writers Writers and authors Interpreters and translators Broadcast technicians Sound engineering technicians Camera operators, television, video, and film Film and video editors Securities, commodities, and financial services sales agents Sales representatives, wholesale and manufacturing, technical and scientific products Sales engineers Proofreaders and copy markers Statistical assistants
--	--

**Table A2: UNCG Liberal Arts Bachelor’s Degree Programs**

African American and African Diaspora Studies	Liberal and Interdisciplinary Studies
Anthropology	Media Studies
Art	Music
Arts Administration	Peace and Conflict Studies
Classical Studies	Performance
Communication Studies	Philosophy
Dance (Choreography and Performance)	Political Science
Dance Studies	Psychology
Drama	Religious Studies
English	Social Work
Geography	Sociology
History	Spanish
Integrated Professional Studies	Studio Art
Interior Architecture	Women’s, Gender, and Sexuality Studies
Languages, Literatures, and Cultures	

**Competitor Analysis Methodology**

The competitor analysis includes institutions identified from UNCG-provided data originally obtained from the National Student Clearinghouse. Ten competitors were identified based on the number of students who applied to UNCG but did not attend, and instead enrolled in other institutions. While not intentionally limited to North Carolina, UNCG’s largest competitors were located within the state (see Table A3).

**Table A3: UNCG Competitor Analysis Institutions**

<b>UNCG Competitor Institutions</b>	<b>Number UNCG Applicants (Entering into the 2022 Cohort Year) Who Enrolled at Competitor Four-Year Institutions</b>
Appalachian State University	571
East Carolina University	522
Fayetteville State University	84
North Carolina Central University	123
North Carolina State University at Raleigh	564
University of North Carolina at Chapel Hill	980
University of North Carolina at Charlotte	420
University of North Carolina Wilmington	261
Western Carolina University	166
Winston-Salem State University	92

The competitor analysis uses publicly available data on degrees and certificates awarded from the Integrated Postsecondary Education Data System (IPEDS). The data on competitor awards is connected to academic programs currently offered at UNCG, as well as programs identified in the gap analysis as potential opportunities for new program creation. The unit of analysis and the connection point between UNCG programs and competitor programs is the 6-digit CIP code plus the type of award (bachelor’s degree, postbaccalaureate certificate, master’s degree, post-master’s certificate, or doctoral/professional degree).



For each program, analysis metrics include market saturation and program demand calculated using 2018-2021 IPEDS degree and certificate awards data.

- Market Saturation = # institutions offering program/10
- Program Demand = Ratio of competitors offering the program demonstrating positive growth

Seventy of UNCG’s program offerings were not offered as competing programs by the 10 competitor institutions (see Table A4).

**Table A4: UNCG Academic Programs Without Competitor Data**

<p>Analytical Instrumentation - Certificate  Consumer, Apparel, and Retail Studies - Doctorate  Global Fashion Industry Management - Certificate  Retail Consumer Data Analytics - Certificate  Retail Merchandising Management - Certificate  Retail Studies - Master's  Applied Statistics - Master's  Athlete Well-Being - Certificate  Chemistry and Biochemistry - Doctorate  Synthetic Biology - Certificate  Economics - Doctorate  Leadership in Infant and Toddler Learning - Certificate  Communication Sciences and Disorders - Doctorate  Computational Mathematics - Doctorate  Information Systems and Supply Chain Management - Bachelor's  Information Technology Development - Certificate  Information Technology Management - Certificate  Special Endorsement in Computer Education - Certificate  Dance - Certificate  Dance - Master's  Business Analytics - Certificate  Dance Education - Master's  Birth-Kindergarten Initial Licensure - Certificate  Birth-Kindergarten Interdisciplinary Studies in Education and Development - Master's  Quantitative Business Economics - Certificate  Instructional Coaching - Certificate  Interpreting, Deaf Education and Advocacy Services - Bachelor's  Educational Assessment - Certificate  Educational Research, Measurement, and Evaluation - Doctorate  Educational Research, Measurement, and Evaluation - Master's  e-Learning - Certificate  Environmental Humanities - Certificate  Kinesiology - Doctorate  Historic Preservation - Certificate  Human Development and Family Studies - Bachelor's</p>	<p>Human Development and Family Studies - Doctorate  Genetic Counseling - Master's  Informatics &amp; Analytics - Master's  Interior Architecture - Master's  International Business - Master's  Global Studies - Certificate  Information Systems - Doctorate  Advanced Materials - Certificate  Medical Science - Certificate  Music Education - Certificate  Historical Keyboard Performance - Certificate  Jazz Studies - Certificate  Music - Doctorate  Music Education - Doctorate  Music Technology - Certificate  Music Composition - Certificate  Music Theory - Certificate  Music Theory - Master's  Music Theory Pedagogy - Certificate  Ethnomusicology - Certificate  Musicology - Certificate  Advanced Practice Foundations - Certificate  Nursing - Certificate  Nursing - Master's  Nursing Leadership and Management - Certificate  Dietetic Internship - Certificate  Nanoscience - Certificate  Urban and Economic Development - Certificate  Workplace Wellness - Certificate  Languages, Literatures, and Cultures - Master's  Cultural Foundations and Social Justice Education - Certificate  Geography, Secondary Education - Bachelor's  Climate Justice - Certificate  Sustainability - Certificate  Taxation - Certificate  Women’s, Gender, and Sexuality Studies - Master's</p>
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**From:** [Debbie Storrs](#)  
**To:** [Mike Daly](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Project Leaders Meeting - Agenda for 6/8  
**Date:** Tuesday, June 6, 2023 11:43:35 AM  
**Attachments:** [Outlook-sl0fcqeg.png](#)

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Hi Mike,

I'll review more carefully but at first glance, I would remove the recommendation re: engineering as we won't be able to get these approved by the system office given our mission and competition for such programs in the state. Thanks,  
Debbie

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**From:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Sent:** Tuesday, June 6, 2023 11:24 AM  
**To:** Debbie Storrs <[dastorrs@uncg.edu](mailto:dastorrs@uncg.edu)>; Bob Shea <[r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)>  
**Cc:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Subject:** UNCG/rpk Project Leaders Meeting - Agenda for 6/8

Hi Debbie and Bob,

As discussed last week we'll use the majority of our time this Thursday to introduce Alan to the approach being considered for a direct net revenue analysis.

I've also attached the Market and Labor competition report for your review. This report utilizes publicly available data (labor market projections and degrees conferred) as a frame for understanding the position of UNCG's current academic portfolio. We can certainly schedule more time to discuss this report, as needed.

Debbie, I will be at the Deans retreat tomorrow (virtually) to discuss the academic data dashboard. At present, we are still waiting for validated data from UNCG IR so the dashboard may be limited to my screen-sharing. As data is finalized and shared we will provide direct access for the Deans.

Thanks again,  
Mike Daly

# rpk GROUP

from mission to market

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**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Project Leaders Meeting Agenda & Materials  
**Date:** Tuesday, July 18, 2023 2:33:51 PM  
**Attachments:** [Outlook-vxce5ir3.png](#)  
[UNCG Direct Net Revenue 2023.07.18.23\\_Shared.pdf](#)  
[UNCG HR Analyses Summary Memo\\_DRAFT\\_7.18.23.pdf](#)  
[UNCG Academic Cost and Revenue Analysis Public Table\\_7.18.23.pdf](#)

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Hi Debbie and Bob,

Katie and I are looking forward to our check-in tomorrow. We'd like to focus the conversation on these topics:

- Academic Department Financial Analysis Deck - attached
  - In addition to establishing methodology, this slide deck provides a focused view of the departments within Colleges & Schools; showing student credit hours, expenses, and net revenue.
- Academic Department Financial Analysis Table - attached (recommend downloading for optimal viewing)
- Response to the Market/Demand program analysis
  - rpk will issue an addendum to its narrative report that removes the recommendation of mental health counseling as an opportunity for UNCG. The PRTF is correct in noting that there are limitations in understanding degree to career trajectory in using the federal government's established CIP-SOC crosswalk as mapped to labor projections. With respect to the diversity of UNCG's portfolio and how a combination of other sources (College Scorecard, UNC System Office, U.S. Department of Education's CIP-SOC crosswalk, U.S. Department of Labor/North Carolina Department of Labor, etc.) could be considered, we would recommend that UNCG create a working group in coordination with IR to establish the data sources that can be regularly used to track career/degree outcomes of graduates. Until work is completed, we recommend removing labor-related outcomes from the PRTF's rubric.
- Administrative Services Review update - draft attached
  - Katie will walk through the recommendations tomorrow. Please note that it's still a draft and Katie is waiting to meet with Jeanne for final approval of the numbers.

Thanks again,  
Mike Daly

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# UNC Greensboro

Academic Department Analysis

July 18, 2023

# What's Included & What's Not?

- Finance Data Source: ODS Data Warehouse, Cash Basis
- Years: FY2020, FY2021 & FY2022
- Included:
  - Unrestricted revenues and expenses directly assigned to academic departments
  - Tuition & fees, scholarships/waivers
  - A portion of state appropriations
- Excluded:
  - Restricted, Auxiliary, Loan, Endowment, Agency, and Plant funds
  - Unrestricted fund activity, such as academic administration and institutional administration, not directly assigned to academic departments

# Expense Methodology

- All unrestricted fund expenses with a finance unit identified as an academic department are included. Expenses in other academic unit are excluded.
- Exceptions:
  - **Included**: Fund 112073-DNP Program Tuition Differential is assigned to org 12801-Dean's Office – NU, which is not an academic department. After discussion with dean, it was determined this should be included as a Nursing academic department expense, not a dean expense.
  - **Included**: Expenses for the Joint School of Nanosci/Nanoeng includes org 13201-Dean's Office – NN and 13202-Nanoscience. Unlike other schools, faculty are assigned to the dean's office org as their home department in HR data as well as charged there in finance data. 13202-Nanoscience contains mostly operational expenses.
  - **Excluded**: Differential tuition expense funds within the Bryan School. Per discussion with the dean, they centralize most of those expenses and are not directly related to the instruction of their programs. Thus, these are not included in the analysis.



# Revenue Methodology: Net Tuition & Fees

- Direct net tuition & fee revenues (includes scholarships and waivers) not assigned directly in financial data to an academic department unit are distributed based on one of the following attributes:
  - **All** – Allocated to all academic departments based on portion of total student credit hours produced.
  - **Level** – Allocated to academic departments based on portion of undergraduate or graduate student credit hours produced.
  - **Dept-Level** – Differential tuition and related expenses are assigned to the corresponding department at the graduate level.

# Revenue Methodology: State Appropriation

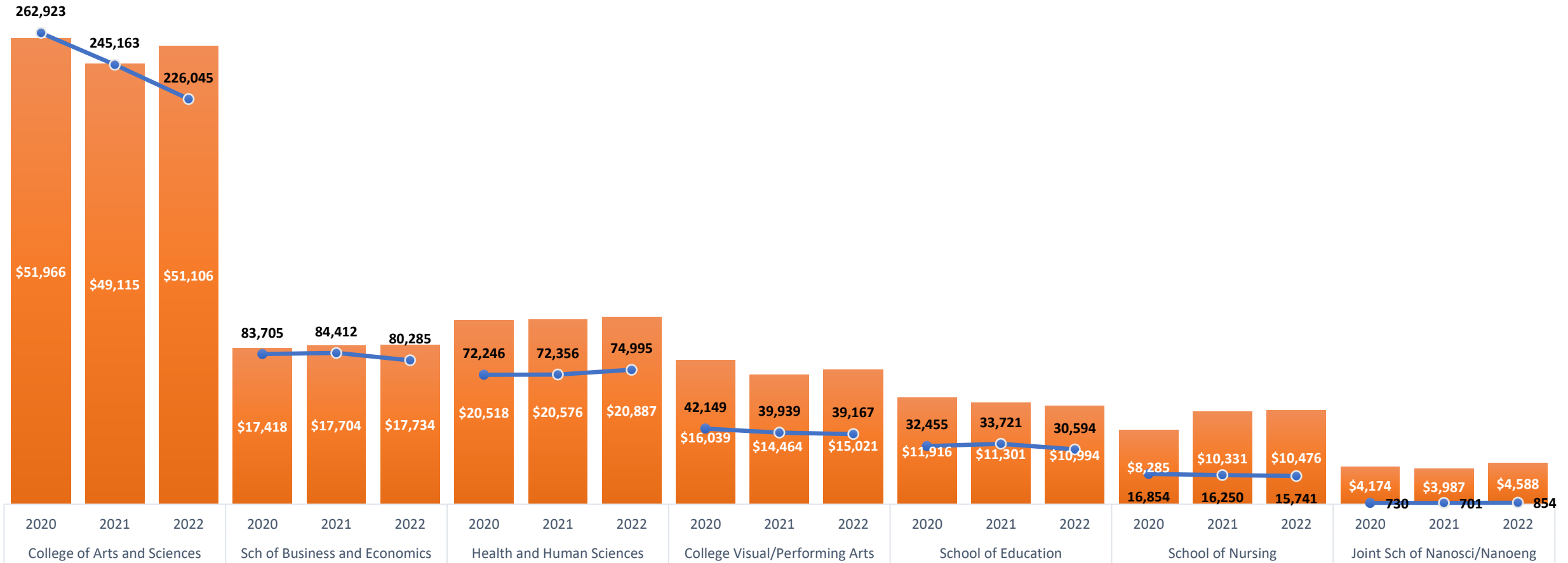
- State appropriation is allocated to academic departments using the current state funding model logic (amounts allocated to units proportional to the funding per credit hour/academic discipline per the FY23 UNC System formula).
- Only a portion of the state revenue is allocated to academic departments. The amount of state revenue allocated ensures that the total amount of revenue in the model is proportionally equal to the amount of expense in a given fiscal year.



# Colleges and Schools

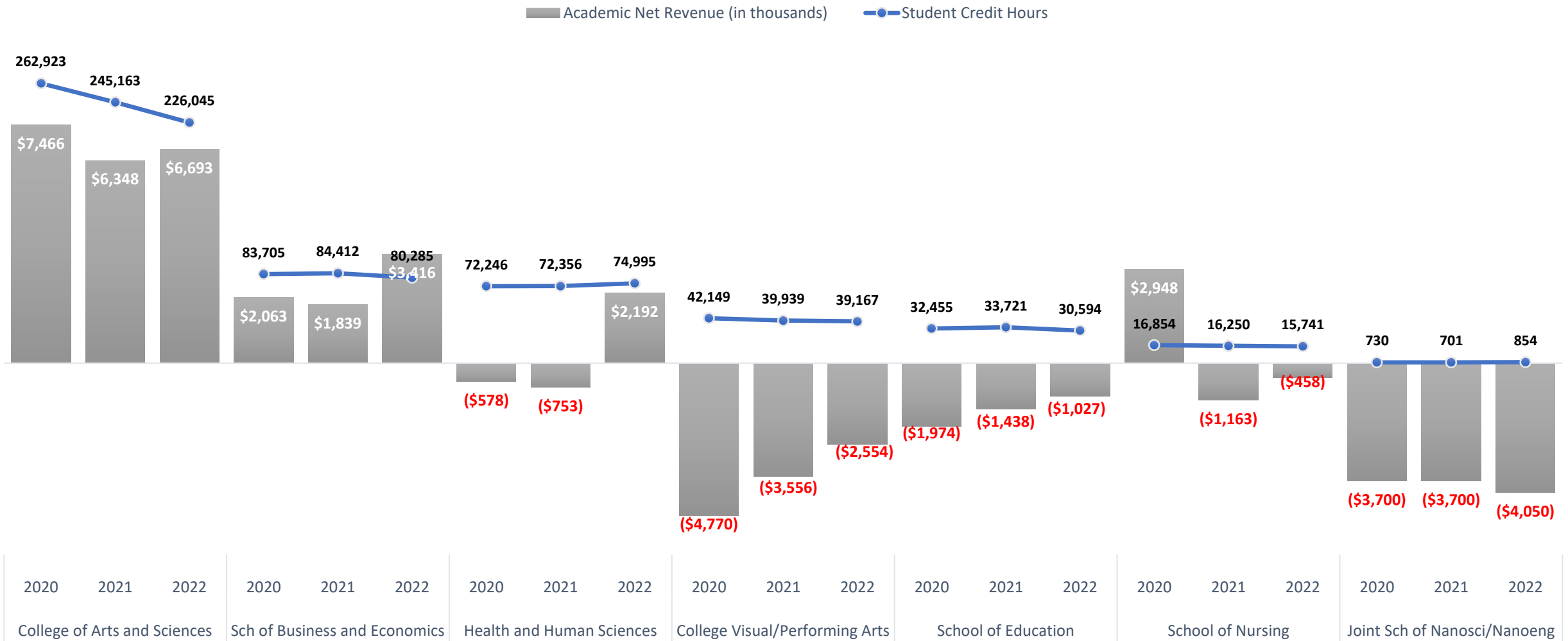
# Colleges & Schools – Student Credit Hours and Academic Expenses

Academic Expenses (in thousands)    Student Credit Hours



Academic Expenses: All unrestricted fund expenses with a finance org identified as an academic department  
 Schools not shown in chart: Interdisciplinary & UNC Exchange

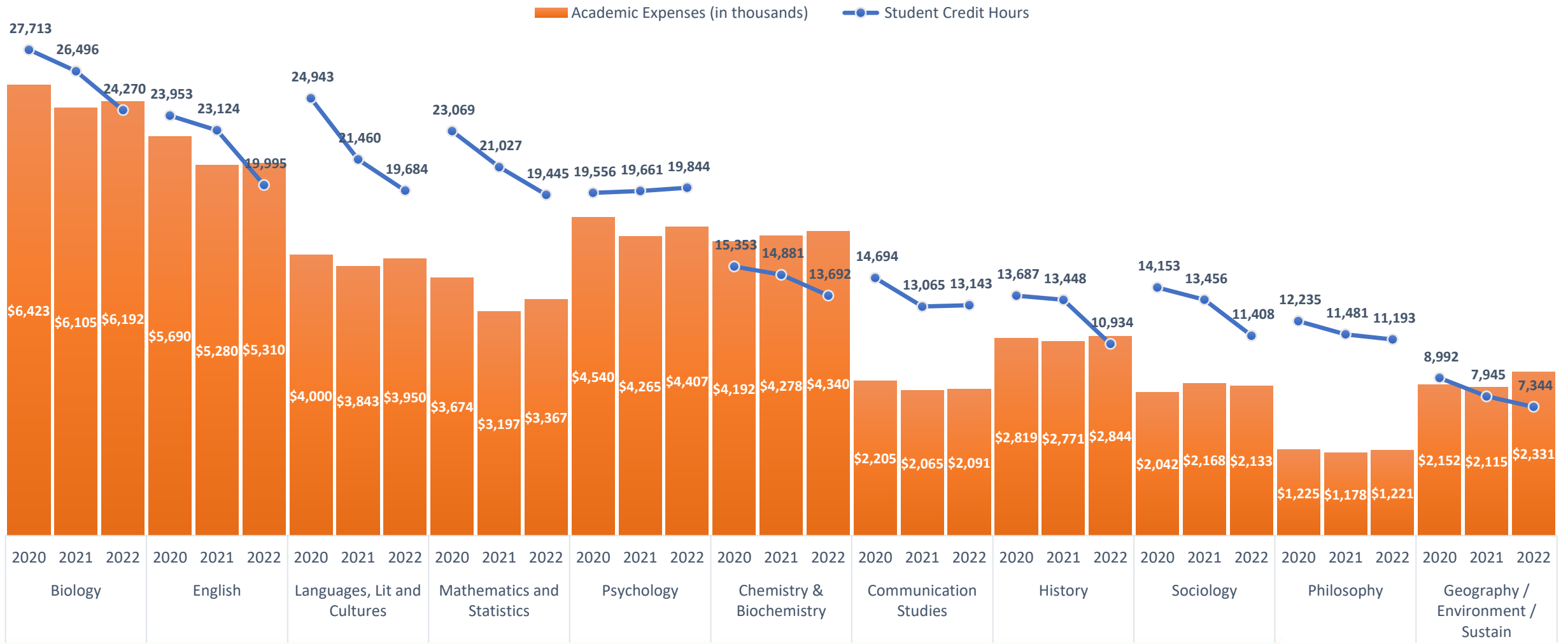
# Colleges & Schools – Student Credit Hours and Academic Net Revenue



Academic Net Revenue is calculated with state appropriation  
 Schools not shown in chart: Interdisciplinary & UNC Exchange

# College of Arts and Sciences

# College of Arts and Sciences – Student Credit Hours and Academic Expenses (1/2)

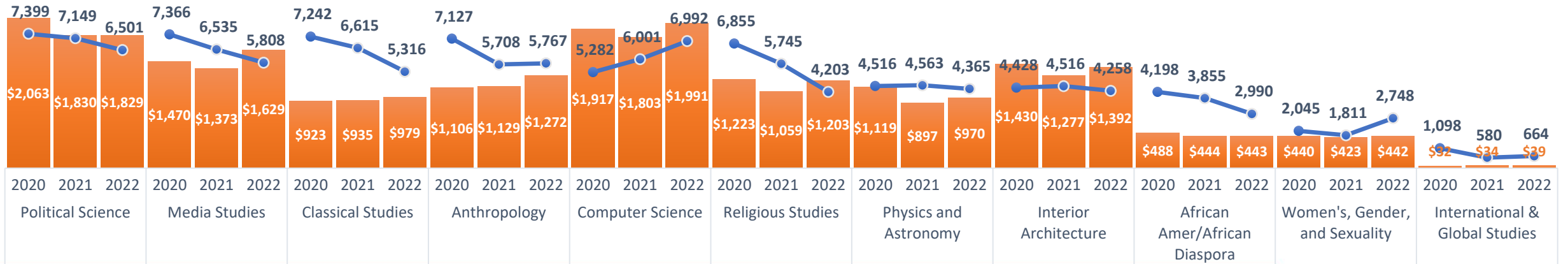


Departments not shown in charts: Associate Dean Programs, Freshmen Seminars, and Special Programs



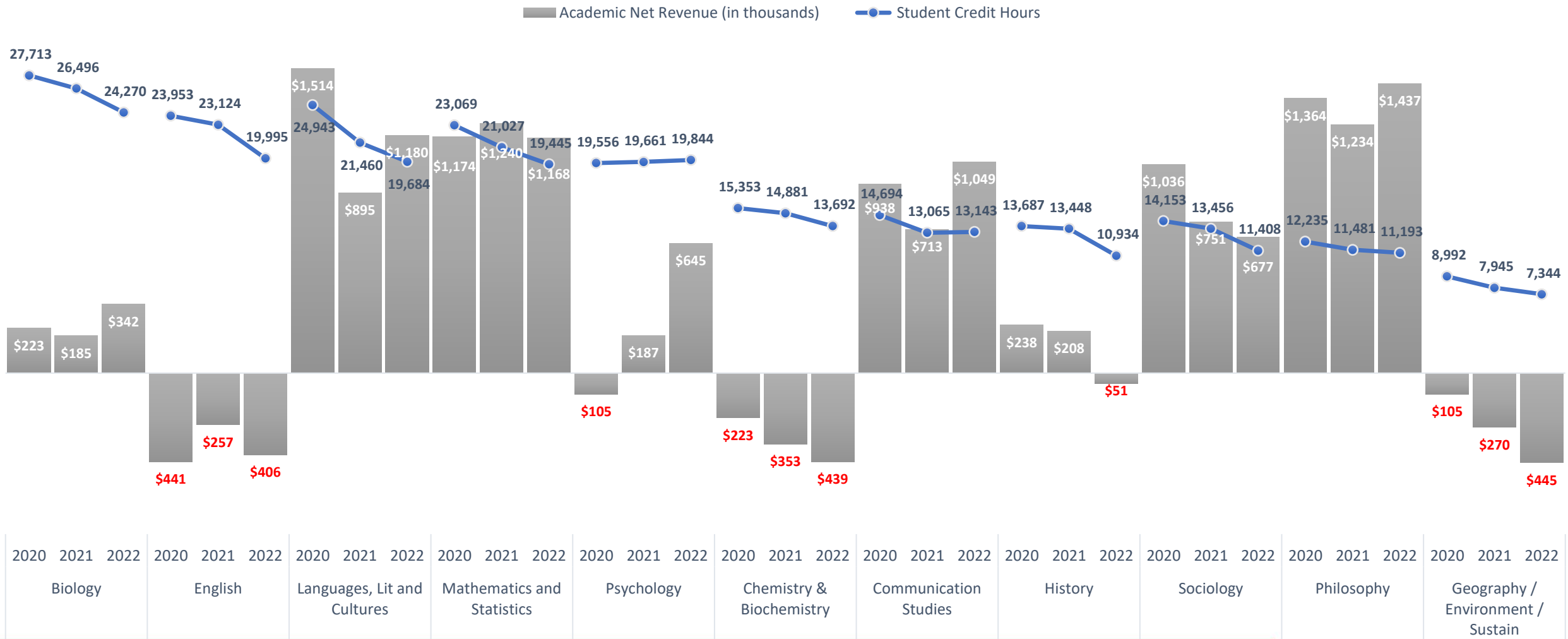
# College of Arts and Sciences –Student Credit Hours and Academic Expenses (2/2)

Academic Expenses (in thousands)    Student Credit Hours



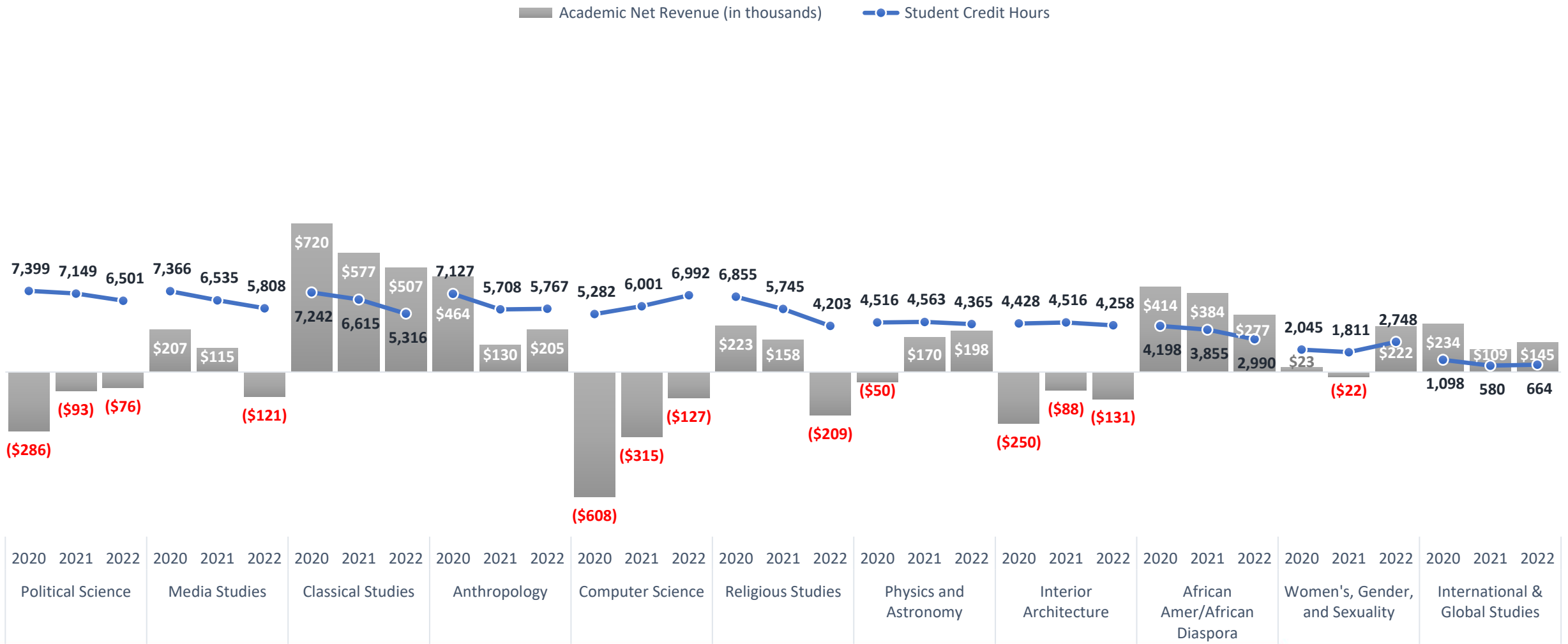
Departments not shown in charts: Associate Dean Programs, Freshmen Seminars, and Special Programs

# College of Arts and Sciences – Student Credit Hours and Academic Net Revenue (1/2)



Academic Net Revenue is calculated with state appropriation  
 Departments not shown in charts: Associate Dean Programs, Freshmen Seminars, and Special Programs.

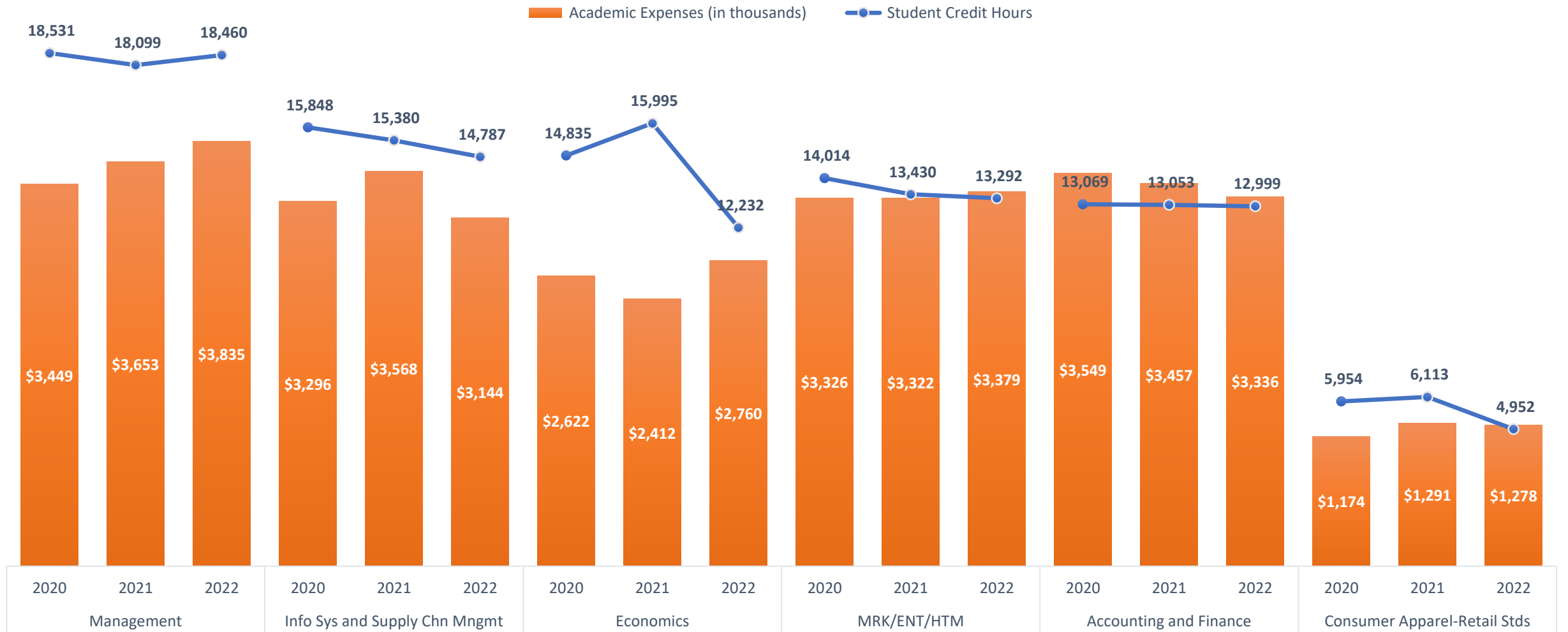
# College of Arts and Sciences – Student Credit Hours and Academic Net Revenue (2/2)



Academic Net Revenue is calculated with state appropriation  
 Departments not shown in charts: Associate Dean Programs, Freshmen Seminars, and Special Programs

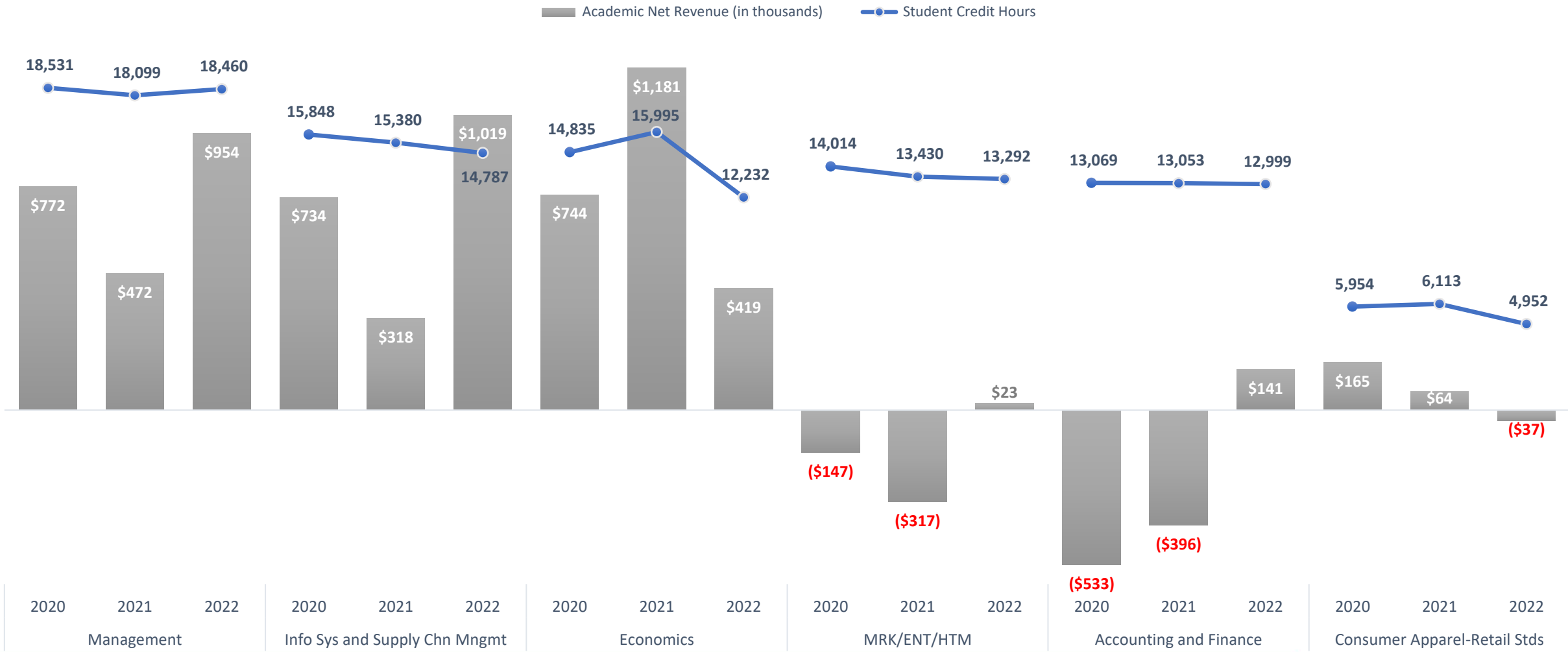
# School of Business and Economics

# Sch of Business of Economics – Student Credit Hours and Academic Expenses



Department not shown in charts: Dean's Office - BE

# Sch of Business of Economics – Student Credit Hours and Academic Net Revenue

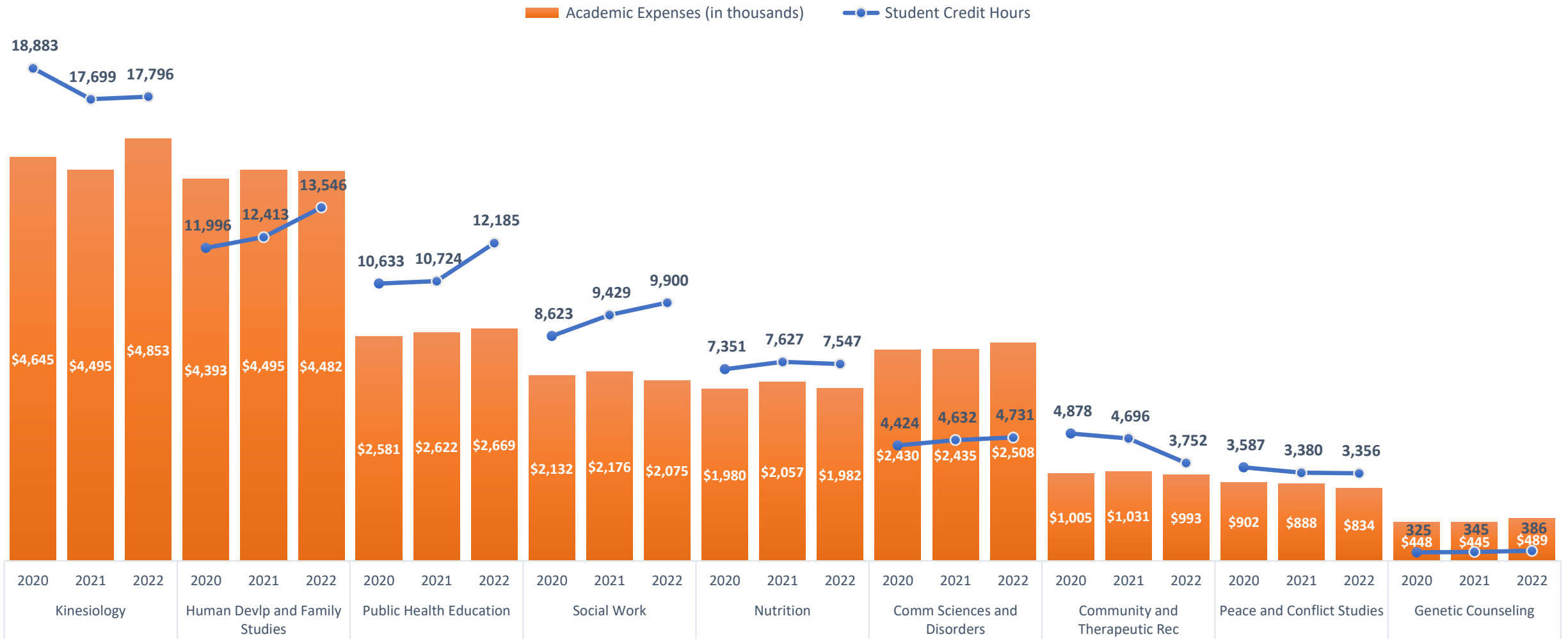


Academic Net Revenue is calculated with state appropriation  
 Department not shown in charts: Dean's Office - BE

# Health and Human Sciences

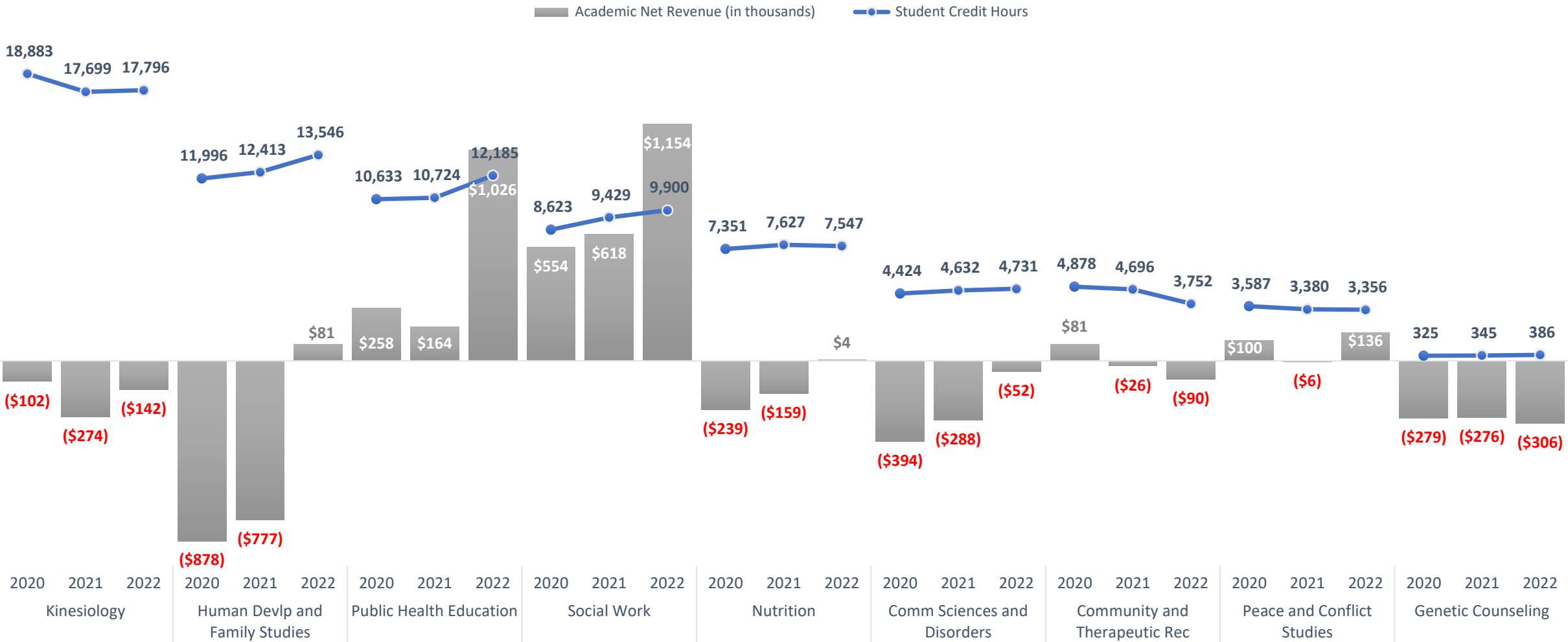


# Health and Human Sciences - Student Credit Hours and Academic Expenses



Department not shown in charts: Dean's Office - HH

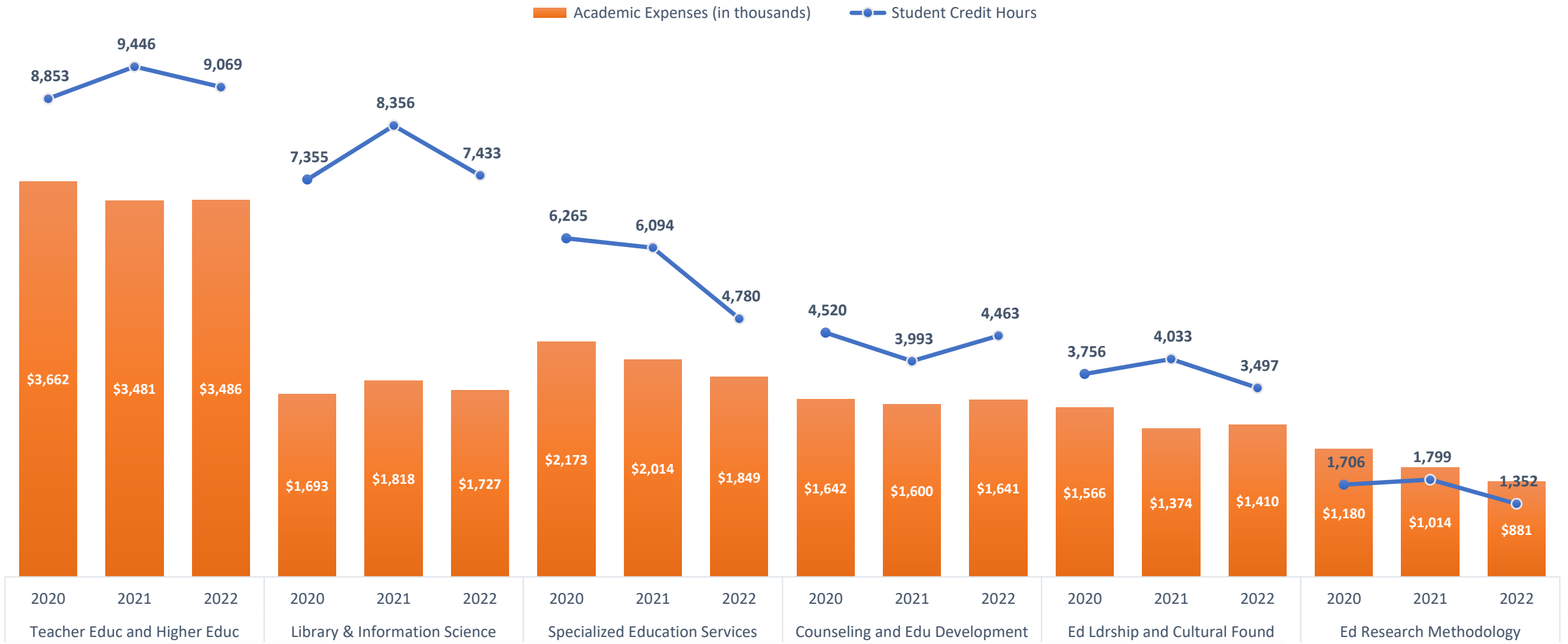
# Health and Human Sciences - Student Credit Hours and Academic Net Revenue



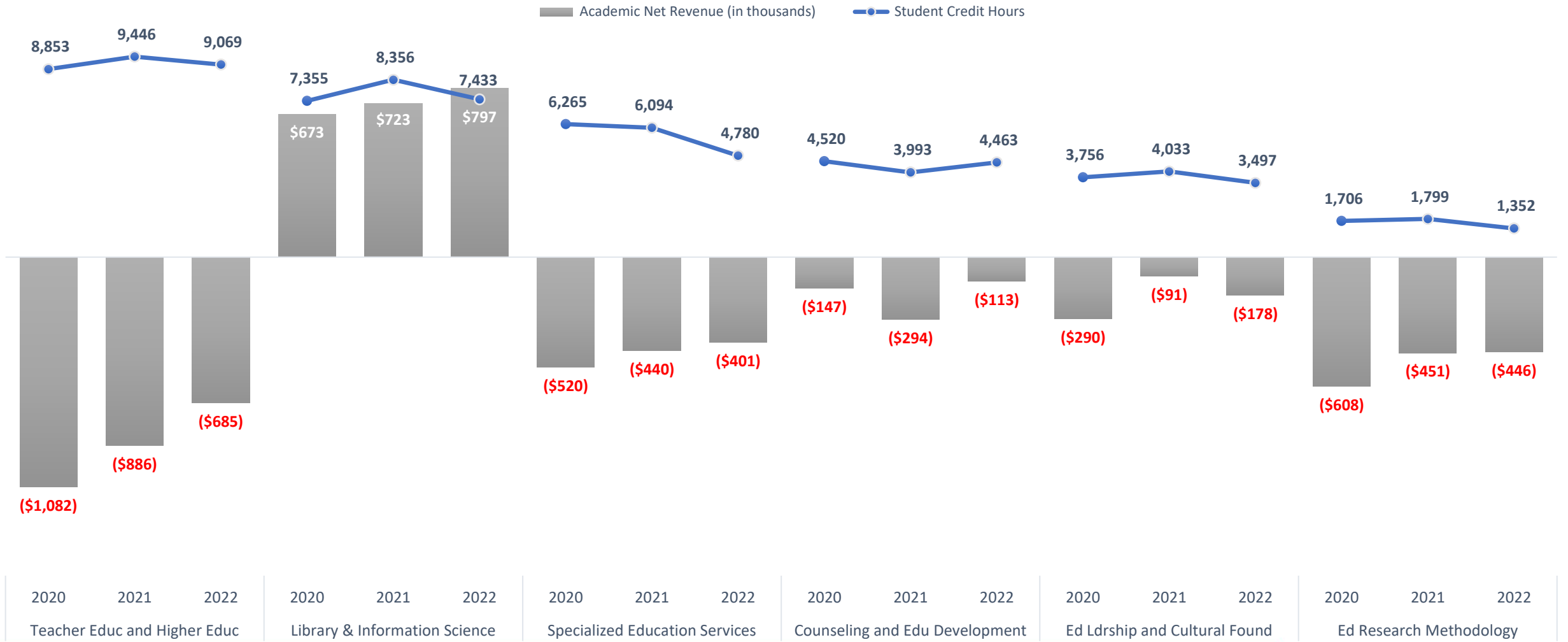
Academic Net Revenue is calculated with state appropriation  
 Department not shown in charts: Dean's Office - HH

# School of Education

# School of Education – Student Credit Hours and Academic Expenses



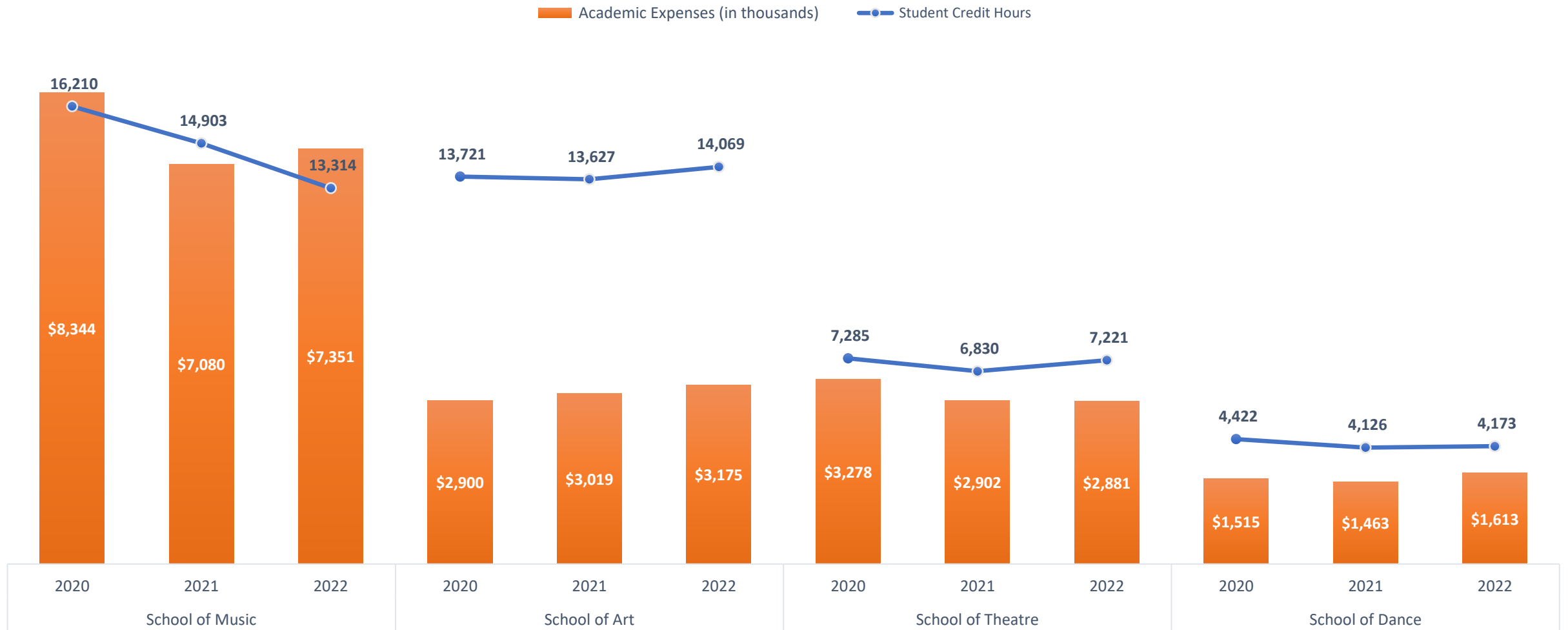
# School of Education – Student Credit Hours and Academic Net Revenue



Academic Net Revenue is calculated with state appropriation

# College Visual/Performing Arts

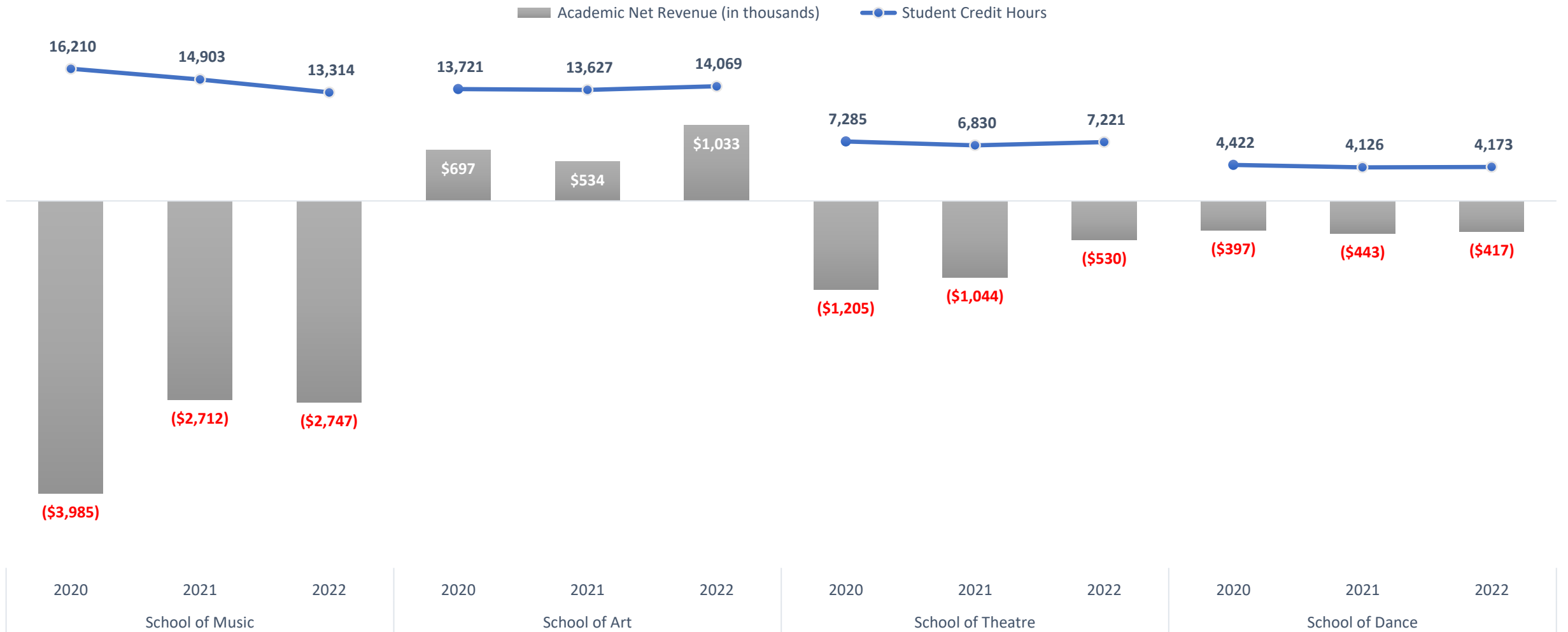
# College Visual/Performing Arts – Student Credit Hours and Academic Expenses



Department not shown in charts: Dean's Office - VP



# College Visual/Performing Arts – Student Credit Hours and Academic Net Revenue



Academic Net Revenue is calculated with state appropriation  
 Department not shown in charts: Dean's Office - VP

# Thank you

Katie Hagan, Principal  
Mike Daly, Sr. Associate  
Raven Moody, Sr. Analyst



**University of North Carolina Greensboro**  
**Human Resources Analyses to Support Administrative Cost Savings**  
**July 18, 2023**

**Background**

University of North Carolina Greensboro (UNCG) partnered with rpk GROUP (rpk) for a comprehensive project to develop a framework and database for academic portfolio and resource evaluation, as well as to support analyses to lead to administrative cost savings. To support UNCG’s efforts to identify administrative cost savings, Katie Hagan from rpk participated in the Chancellor’s Task Force on Financial Sustainability, and rpk fielded a feedback survey to surface ideas for the Task Force and provided feedback and guidance throughout the Task Force meetings as recommendations emerged. One of the key recommendations of the Task Force was to take a closer look at the staffing levels at UNCG, ideally with the goal of achieving financial savings over time through strategic staffing reorganization. This memo captures additional analyses provided by rpk and makes more specific recommendations as to how UNCG can begin working towards strategic reorganization and alignment of staffing to the reduced student population that UNCG now serves.

The recommendations below are informed by a review of the current organizational structure and staffing levels. The data used were 2023 organizational charts as well as a July 2023 all employee report. In addition to quantitative and personnel data, rpk reviewed the results of the campus survey that was fielded in support of the Task Force, and drew upon the firm’s experiences working with UNCG for the last eight months.

**Recommendations**

The recommendations from rpk are as follows:

1. Shared Services - Implement a shared services model for administrative support staff, focusing initially on academic affairs.
2. Restructure of Key Functions - Redesign of business officer, marketing and communications, and facilities functions and roles to achieve efficiency.
3. Spans and Layers - Monitor UNCG institutional span of control and increase the span over time.

*1. Shared Services Approach to Admin Support Roles*

Within the education sector nationally, there is a move to create, redesign and expand shared services models. These models provide greater efficiency and reduced cost, while maintaining or enhancing service delivery. Standardizing and optimizing processes and workflow are essential components of shared services’ success. The streamlined workflow will support an emphasis on continuous business process improvement through automation, process expertise, and data analysis. We believe that shared services can offer a more effective and efficient approach to service delivery for administrative support across UNCG, improving service provider-client relationships and focusing on accountability. A potential option to explore is to first pilot this approach in Academic Affairs, then spread that approach across the institution over time.

*Table 1: Admin Support Roles Compared to All Employees Across UNCG*

	<b>Admin Support FTE</b>	<b>Total Employees*</b>
Academic Affairs	80	754
Chancellor	1	56
Enrollment Management	5	95



Finance and Administration	25	488
Information Technology Services	2	142
Intercollegiate Athletics	1	77
Research and Engagement	1	235
Student Affairs	15	279
University Advancement	6	64

*\*Faculty, temporary staff, and student workers are not captured in total employees; total employees do include funded vacancies*

Across the Academic Affairs division, there are a total of 80 administrative support full-time equivalents (FTEs) to support a division of 754 employees. The administrative support staff are spread out across all departments, with departments having between one and three individuals in those roles. This ratio of administrative support to other employees is one of the lowest across all divisions and points to an opportunity to better manage that investment in administrative support.

Delivery of administrative support services could be made more efficient by having personnel work across departments in a shared service model. A shared service model of this kind would improve service, allowing staff to be flexible and respond to shifting priorities, while ultimately reducing staff over time through natural attrition and workload efficiencies. A shared service model also provides opportunities for individuals to gain new or different experiences and opportunities for professional growth as they support multiple units.

2. Organizational Structure Redesign Opportunities

Simplifying the organization structure across various departments aims to increase the flow of ideas and decisions and streamline workflow across each team and down into the institution while also reducing costs. Based on a review of the 2023 organizational charts across all of UNCG, and confirmed by the June 2023 all employee data, below are opportunities for improved functional alignment and potential efficiencies if backfilling some of these roles is managed strategically:

- a. **Business Officers:** There are 33 business managers, business officers, and business services coordinators within academic affairs, and an additional 27 spread across the rest of the institution. These roles are critical for financial management, but this level of decentralization in a financial role can create challenges for the university. Specifically, if not managed very carefully, units will operate independent of one another and create unique and inconsistent business processes. rpk saw this firsthand when working with academic affairs to understand the cost of departmental operations – different colleges had different practices when it came to booking particular expenses, which made an apples-to-apples comparison challenging and manual to create. UNCG should determine if this level of decentralized financial support for units is desirable and strategic. If it is not, efforts should be made to create a more centralized pool of financial support personnel, reporting up through the Vice Chancellor for Finance and Administration. Following administrative support, this function is the clearest area of opportunity for shared services for UNCG.
- b. **Marketing and Communication Roles:** While there is a central marketing and communications staff that serves the university, a few other units operate their own teams of marketing and communication support, such as advancement, athletics, housing and residence life, campus activities and programs, enrollment management, the school of nursing, and the office of research and engagement. Like the decentralized business function above, UNCG should assess whether maintaining duplicative and decentralized marketing and communication roles supports the institution in achieving the ideal level of marketing and communication support. This level of decentralization could hinder consistency in branding and messaging. UNCG should determine whether

resources could be reclaimed centrally to serve the entire university community more effectively, reporting up through the Vice Chancellor for Strategic Communication.

- c. **Facilities:** UNCG has a robust facilities staff with some specialization – most notably an in-house architect and at least seven in-house engineers. UNCG also operates two different facilities staffs, one within finance and administration, and another within student affairs. Collectively, UNCG has more than 250 employees supporting the maintenance and upkeep of the buildings and grounds. This is a significant investment. UNCG should do its due diligence and ensure this level of investment is in line with industry standards.

### 3. Monitor UNCG Span of Control and Increase Over Time

Span of control refers to the number of direct reports a manager supervises. Over time, complexity creeps into institutions and layers accumulate, increasing the distance between leadership and the front line. Higher education benchmarks include average spans of 6–7 for expertise-based functions and average spans of 11–13 for task-based functions.

Creating higher spans drives effectiveness (higher value) by:

- Streamlining processes for more effective execution
- Focusing supervisors on highest-value work
- Empowering direct reports

Creating higher spans drives efficiency (lower cost) by:

- Eliminating redundant or lower-value supervisory activities (i.e., time spent communicating up and down the chain of command)
- Identifying and correcting for under-utilization of supervisory resources

The data used to calculate spans and layers savings for UNCG was submitted in June 2023. The data includes budgeted vacancies. The data also excludes faculty (but includes deans, directors, and coordinators), student workers, and temporary employees.

*Table 2: Spans and Layers Analysis of UNCG, July 2023*

Division	Supervisors	Total Employees	Span of Control
Academic Affairs	252	754	3.0
Chancellor	22	56	2.5
Enrollment Management	29	95	3.3
Finance and Administration	93	488	5.2
Information Technology Services	22	142	6.4
Intercollegiate Athletics	25	77	3.1
Research and Engagement	52	235	4.5
Student Affairs	73	279	3.8
University Advancement	22	64	2.9
	590	2,189	3.7

UNCG operates at a span of control of four – meaning that, across the institution, the average supervisor oversees four direct reports. However, this varies widely by division and within departments. UNCG should monitor this metric as part of the effort to strategically realign staffing plans in response to lower student enrollment and identify opportunities to reduce managerial structures and increase spans of control for appropriate functions.

Based on a review of organizational charts at UNCG and confirmed in the review of the June 2023 all employee report, the following areas stood out as having many managers or leaders (based on title), and relatively few direct reports:

1. Academic Achievement Center – one senior assistant director and four assistant directors, with only two support staff
2. Dean of Students – five total assistant or associate deans with no direct reports
3. Undergraduate Admissions – a total of 13 assistant and associate directors for an entire staff of only 29

### **Conclusion**

UNCG has invested considerable time and energy into assessing its resource allocations (people, time and money) and opportunities to maintain or enhance services while reducing costs. Achieving those opportunities will largely impact positions at UNCG. The review summarized above provides a roadmap and a set of tools that UNCG can use to design a new organization structure and the path to achieve that structure. This includes a move to shared services models and an ongoing review of spans and layers.

It will be important to separate the desired end state from the process and timing for implementing that end state. Meaning, UNCG can elect to move toward a new organization structure and related efficiencies more organically as vacancies emerge, or it can move more quickly to reallocate resources. These two approaches reflect a tradeoff between speed and the capture of cost savings.



**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Project Leaders Meeting Agenda & Materials  
**Date:** Tuesday, July 18, 2023 2:58:21 PM  
**Attachments:** [Outlook-vxce5ir3.png](#)  
[UNCG Academic Cost and Revenue Analysis Public Table 7.18.23.xlsx](#)

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Hi Debbie and Bob,

To save your eyes I've attached an alternative view of the Academic Department Financial Analysis Table.

Thanks again,  
Mike Daly  
rpk GROUP

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**From:** Mike Daly  
**Sent:** Tuesday, July 18, 2023 2:31 PM  
**To:** Debbie Storrs <dastorrs@uncg.edu>; Bob Shea <r\_shea@uncg.edu>  
**Cc:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** UNCG/rpk Project Leaders Meeting Agenda & Materials

Hi Debbie and Bob,

Katie and I are looking forward to our check-in tomorrow. We'd like to focus the conversation on these topics:

- Academic Department Financial Analysis Deck - attached
  - In addition to establishing methodology, this slide deck provides a focused view of the departments within Colleges & Schools; showing student credit hours, expenses, and net revenue.
- Academic Department Financial Analysis Table - attached (recommend downloading for optimal viewing)
- Response to the Market/Demand program analysis
  - rpk will issue an addendum to its narrative report that removes the recommendation of mental health counseling as an opportunity for UNCG. The PRTF is correct in noting that there are limitations in understanding degree to career trajectory in using the federal government's established CIP-SOC crosswalk as mapped to labor projections. With respect to the diversity of UNCG's portfolio and how a combination of other sources (College Scorecard, UNC System Office, U.S. Department of Education's CIP-SOC crosswalk, U.S. Department of Labor/North Carolina Department of Labor, etc.) could be considered, we would recommend that UNCG create a working group in coordination with IR to establish the data sources that can be regularly used to track career/degree outcomes of graduates. Until work is completed, we recommend removing labor-related outcomes from the PRTF's rubric.
- Administrative Services Review update - draft attached

Katie will walk through the recommendations tomorrow. Please note that it's still a draft and Katie is waiting to meet with Jeanne for final approval of the numbers.

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

July 18, 2023	Student Credit Hours			Tuition and Fees			State Appropriation & Other Revenue			Total Revenues			Personnel Expenses			Non-Personnel Expenses			Total Expenses			Revenues minus Expenses		
	2020	2021	2022	2020	2021	2022	2020	2021	2022	2020	2021	2022	2020	2021	2022	2020	2021	2022	2020	2021	2022	2020	2021	2022
<b>College of Arts and Sciences</b>																								
African Amer/African Diaspora	4,198	3,855	2,990	\$ 583,744	\$ 547,012	\$ 420,742	\$ 317,677	\$ 280,731	\$ 300,022	\$ 901,422	\$ 827,743	\$ 720,764	\$ (464,889)	\$ (433,613)	\$ (437,010)	\$ (22,909)	\$ (10,504)	\$ (6,337)	\$ (487,799)	\$ (444,117)	\$ (443,347)	\$ 413,623	\$ 383,266	\$ 277,417
Anthropology	7,127	5,708	5,767	\$ 990,399	\$ 809,947	\$ 811,512	\$ 578,847	\$ 449,419	\$ 665,594	\$ 1,569,246	\$ 1,259,366	\$ 1,477,106	\$ (1,029,239)	\$ (1,103,907)	\$ (1,172,874)	\$ (76,308)	\$ (24,961)	\$ (99,341)	\$ (1,128,868)	\$ (1,272,216)	\$ (463,699)	\$ 130,498	\$ 204,891	
Biology	27,713	26,496	24,270	\$ 3,939,536	\$ 3,815,676	\$ 3,466,888	\$ 2,680,934	\$ 2,462,811	\$ 3,054,739	\$ 6,620,470	\$ 6,278,487	\$ 6,523,687	\$ (5,630,950)	\$ (5,760,424)	\$ (5,574,123)	\$ (792,165)	\$ (344,467)	\$ (618,117)	\$ (6,423,115)	\$ (6,104,891)	\$ (6,192,240)	\$ 197,355	\$ 173,596	\$ 331,447
Chemistry & Biochemistry	15,353	14,881	13,692	\$ 2,205,238	\$ 2,155,264	\$ 1,960,194	\$ 1,764,020	\$ 1,769,506	\$ 1,940,139	\$ 3,969,258	\$ 3,924,769	\$ 3,900,333	\$ (3,825,243)	\$ (3,721,051)	\$ (3,804,031)	\$ (366,847)	\$ (556,690)	\$ (535,598)	\$ (4,192,090)	\$ (4,277,742)	\$ (4,339,629)	\$ (222,832)	\$ (352,972)	\$ (439,295)
Classical Studies	7,242	6,615	5,316	\$ 1,003,130	\$ 938,647	\$ 748,049	\$ 640,108	\$ 573,365	\$ 737,226	\$ 1,643,238	\$ 1,512,012	\$ 1,485,275	\$ (865,063)	\$ (914,734)	\$ (916,025)	\$ (58,186)	\$ (20,645)	\$ (62,605)	\$ (923,249)	\$ (935,379)	\$ (978,630)	\$ 719,989	\$ 576,634	\$ 506,645
Communication Studies	14,694	13,065	13,143	\$ 2,070,796	\$ 1,881,014	\$ 1,872,119	\$ 1,064,455	\$ 897,323	\$ 1,267,719	\$ 3,135,250	\$ 2,778,337	\$ 3,139,838	\$ (2,488,876)	\$ (2,024,514)	\$ (2,051,866)	\$ (55,677)	\$ (40,981)	\$ (38,972)	\$ (2,204,553)	\$ (2,065,495)	\$ (2,090,838)	\$ 930,697	\$ 712,842	\$ 1,049,000
Computer Science	5,282	6,001	6,992	\$ 833,322	\$ 915,879	\$ 1,090,515	\$ 475,719	\$ 572,146	\$ 773,506	\$ 1,309,041	\$ 1,488,024	\$ 1,864,021	\$ (1,826,157)	\$ (1,777,383)	\$ (1,926,622)	\$ (90,655)	\$ (25,160)	\$ (64,277)	\$ (1,916,808)	\$ (1,802,542)	\$ (1,990,900)	\$ (607,768)	\$ (314,518)	\$ (126,878)
English	23,953	23,124	19,995	\$ 3,476,221	\$ 3,389,465	\$ 2,908,223	\$ 1,752,661	\$ 1,618,440	\$ 1,980,085	\$ 5,228,882	\$ 5,007,905	\$ 4,888,308	\$ (5,553,702)	\$ (5,216,501)	\$ (5,201,395)	\$ (136,499)	\$ (63,751)	\$ (108,730)	\$ (5,690,201)	\$ (5,280,252)	\$ (5,310,125)	\$ (461,319)	\$ (272,347)	\$ (421,817)
Geography/Environment/Sustain	8,992	7,945	7,344	\$ 1,315,198	\$ 1,188,108	\$ 1,118,190	\$ 731,577	\$ 656,900	\$ 767,525	\$ 2,046,775	\$ 1,845,008	\$ 1,885,714	\$ (2,062,614)	\$ (2,049,453)	\$ (2,123,451)	\$ (89,835)	\$ (65,895)	\$ (207,403)	\$ (2,152,450)	\$ (2,115,348)	\$ (2,330,854)	\$ (106,635)	\$ (270,340)	\$ (445,140)
History	13,687	13,448	10,934	\$ 2,012,587	\$ 1,989,911	\$ 1,605,697	\$ 1,044,556	\$ 989,758	\$ 1,187,187	\$ 3,057,143	\$ 2,979,668	\$ 2,792,883	\$ (2,718,761)	\$ (2,743,237)	\$ (2,794,993)	\$ (99,917)	\$ (27,995)	\$ (49,318)	\$ (2,818,679)	\$ (2,771,232)	\$ (2,844,312)	\$ 238,465	\$ 208,436	\$ 151,428)
Interior Architecture	4,428	4,516	4,258	\$ 645,425	\$ 666,225	\$ 618,245	\$ 535,314	\$ 523,337	\$ 642,703	\$ 1,180,739	\$ 1,189,562	\$ 1,260,947	\$ (1,298,471)	\$ (1,209,474)	\$ (1,196,476)	\$ (131,898)	\$ (67,643)	\$ (195,118)	\$ (1,430,369)	\$ (1,277,118)	\$ (1,391,594)	\$ (249,630)	\$ (87,556)	\$ (130,647)
International & Global Studies	1,098	580	664	\$ 152,583	\$ 82,300	\$ 93,436	\$ 112,605	\$ 61,192	\$ 90,482	\$ 265,188	\$ 143,492	\$ 183,918	\$ (24,917)	\$ (33,948)	\$ (35,360)	\$ (6,640)	\$ (4,56)	\$ (3,315)	\$ (31,557)	\$ (34,404)	\$ (38,675)	\$ 233,631	\$ 109,088	\$ 145,243
Languages, Lit and Cultures	24,943	21,460	19,684	\$ 3,486,621	\$ 3,060,623	\$ 2,786,273	\$ 2,027,821	\$ 1,677,790	\$ 2,226,741	\$ 5,514,442	\$ 4,738,414	\$ 5,013,014	\$ (3,881,837)	\$ (3,796,436)	\$ (3,725,968)	\$ (118,417)	\$ (46,532)	\$ (223,885)	\$ (4,000,255)	\$ (3,842,968)	\$ (3,949,853)	\$ 1,514,187	\$ 895,446	\$ 1,063,161
Mathematics and Statistics	23,069	21,027	19,445	\$ 3,287,870	\$ 3,061,919	\$ 2,803,764	\$ 1,560,445	\$ 1,374,999	\$ 1,730,639	\$ 4,848,315	\$ 4,436,918	\$ 4,530,403	\$ (3,482,374)	\$ (3,149,837)	\$ (3,312,634)	\$ (192,099)	\$ (47,329)	\$ (53,983)	\$ (3,674,473)	\$ (3,197,165)	\$ (3,366,617)	\$ 1,173,842	\$ 1,239,573	\$ 1,167,786
Media Studies	7,366	6,535	5,808	\$ 1,059,173	\$ 959,636	\$ 847,496	\$ 617,575	\$ 528,906	\$ 660,486	\$ 1,676,749	\$ 1,488,542	\$ 1,507,982	\$ (1,369,068)	\$ (1,334,047)	\$ (1,292,579)	\$ (100,692)	\$ (39,153)	\$ (236,524)	\$ (1,469,760)	\$ (1,373,200)	\$ (1,629,103)	\$ 206,989	\$ 115,342	\$ (121,121)
Philosophy	12,235	11,481	11,193	\$ 1,703,201	\$ 1,631,402	\$ 1,577,101	\$ 886,287	\$ 781,181	\$ 1,080,839	\$ 2,589,488	\$ 2,412,583	\$ 2,657,941	\$ (1,175,372)	\$ (1,156,874)	\$ (1,191,472)	\$ (49,656)	\$ (21,257)	\$ (29,380)	\$ (1,225,028)	\$ (1,178,311)	\$ (1,220,852)	\$ 1,364,460	\$ 1,234,452	\$ 1,437,088
Physics and Astronomy	4,516	4,563	4,365	\$ 627,663	\$ 647,475	\$ 614,227	\$ 441,747	\$ 419,362	\$ 554,119	\$ 1,069,311	\$ 1,066,837	\$ 1,166,347	\$ (977,324)	\$ (863,148)	\$ (845,400)	\$ (141,734)	\$ (34,091)	\$ (124,660)	\$ (1,119,058)	\$ (897,238)	\$ (970,059)	\$ (49,747)	\$ 166,599	\$ 198,287
Political Science	7,399	7,149	6,501	\$ 1,171,841	\$ 1,153,794	\$ 1,020,822	\$ 604,716	\$ 583,103	\$ 730,795	\$ 1,776,558	\$ 1,736,897	\$ 1,751,617	\$ (2,024,454)	\$ (1,814,915)	\$ (1,794,638)	\$ (38,701)	\$ (14,972)	\$ (34,487)	\$ (2,063,156)	\$ (1,829,887)	\$ (1,829,124)	\$ (286,598)	\$ (92,990)	\$ (77,507)
Psychology	19,556	19,661	19,844	\$ 2,814,176	\$ 2,891,603	\$ 2,883,568	\$ 1,533,022	\$ 1,480,748	\$ 2,074,892	\$ 4,347,198	\$ 4,372,351	\$ 4,956,460	\$ (4,282,310)	\$ (4,124,089)	\$ (4,146,765)	\$ (257,877)	\$ (140,543)	\$ (259,947)	\$ (4,540,187)	\$ (4,264,632)	\$ (4,406,712)	\$ (192,989)	\$ 107,719	\$ 551,747
Religious Studies	6,855	5,745	4,203	\$ 955,078	\$ 815,197	\$ 591,431	\$ 490,882	\$ 401,754	\$ 402,106	\$ 1,445,959	\$ 1,246,951	\$ 993,537	\$ (1,183,821)	\$ (1,034,584)	\$ (1,181,267)	\$ (38,818)	\$ (24,798)	\$ (21,378)	\$ (1,222,639)	\$ (1,059,382)	\$ (1,202,645)	\$ 223,320	\$ 157,569	\$ (209,108)
Sociology	14,153	13,456	11,408	\$ 2,011,466	\$ 1,946,016	\$ 1,647,050	\$ 1,066,027	\$ 972,588	\$ 1,162,481	\$ 3,077,493	\$ 2,916,604	\$ 2,808,531	\$ (1,980,225)	\$ (1,134,630)	\$ (1,209,338)	\$ (61,445)	\$ (32,968)	\$ (38,618)	\$ (2,041,671)	\$ (2,167,598)	\$ (2,132,951)	\$ 1,038,823	\$ 751,006	\$ 676,579
Women's, Gender, and Sexuality	2,045	1,811	2,748	\$ 309,691	\$ 276,682	\$ 405,161	\$ 152,827	\$ 124,251	\$ 259,115	\$ 462,518	\$ 400,932	\$ 664,277	\$ (396,712)	\$ (402,098)	\$ (409,742)	\$ (43,148)	\$ (21,252)	\$ (32,304)	\$ (439,800)	\$ (423,550)	\$ (442,046)	\$ 22,658	\$ (22,418)	\$ 222,230
<b>College Visual/Performing Arts</b>																								
School of Art	13,721	13,627	14,069	\$ 2,196,971	\$ 2,218,878	\$ 2,263,422	\$ 1,400,551	\$ 1,334,339	\$ 1,944,506	\$ 3,597,522	\$ 3,553,218	\$ 4,207,928	\$ (2,562,403)	\$ (2,852,353)	\$ (3,004,205)	\$ (338,046)	\$ (166,430)	\$ (170,623)	\$ (2,900,448)	\$ (3,018,784)	\$ (3,174,828)	\$ 697,074	\$ 534,434	\$ 1,033,099
School of Dance	4,422	4,126	4,173	\$ 688,602	\$ 662,088	\$ 648,666	\$ 422,994	\$ 354,985	\$ 547,527	\$ 1,111,596	\$ 1,017,073	\$ 1,195,993	\$ (1,431,251)	\$ (1,426,997)	\$ (1,524,756)	\$ (84,189)	\$ (33,533)	\$ (88,591)	\$ (1,515,440)	\$ (1,462,531)	\$ (1,613,348)	\$ (403,845)	\$ (445,575)	\$ (417,355)
School of Music	16,210	14,903	13,314	\$ 2,623,982	\$ 2,400,862	\$ 2,119,829	\$ 1,735,409	\$ 1,966,893	\$ 2,484,516	\$ 4,359,391	\$ 4,367,755	\$ 4,604,345	\$ (7,072,896)	\$ (6,876,032)	\$ (7,042,647)	\$ (1,271,253)	\$ (203,898)	\$ (308,592)	\$ (8,344,149)	\$ (7,079,930)	\$ (7,351,239)	\$ (3,984,758)	\$ (2,712,175)	\$ (2,746,894)
School of Theatre	7,285	6,830	7,221	\$ 1,202,431	\$ 1,130,786	\$ 1,187,729	\$ 870,424	\$ 727,966	\$ 1,159,192	\$ 2,072,854	\$ 1,858,752	\$ 2,346,922	\$ (2,597,414)	\$ (2,652,053)	\$ (2,573,627)	\$ (680,850)	\$ (250,372)	\$ (307,848)	\$ (3,278,264)	\$ (2,902,425)	\$ (2,881,475)	\$ (1,205,410)	\$ (1,043,673)	\$ (534,554)
<b>Health and Human Sciences</b>																								
Comm Sciences and Disorders	4,424	4,632	4,731	\$ 1,143,158	\$ 1,202,846	\$ 1,199,953	\$ 893,055	\$ 944,119	\$ 1,255,631	\$ 2,036,212	\$ 2,146,965	\$ 2,455,584	\$ (2,120,600)	\$ (2,131,005)	\$ (2,114,987)	\$ (809,170)	\$ (304,138)	\$ (392,552)	\$ (2,429,770)	\$ (2,435,143)	\$ (2,507,538)	\$ (393,558)	\$ (288,178)	\$ (51,954)
Community and Therapeutic Rec	4,878	4,696	3,752	\$ 733,692	\$ 706,081	\$ 562,544	\$ 352,534	\$ 298,691	\$ 340,823	\$ 1,086,226	\$ 1,004,771	\$ 903,367	\$ (955,100)	\$ (987,489)	\$ (969,817)	\$ (50,315)	\$ (43,090)	\$ (23,284)	\$ (1,005,415)	\$ (1,030,579)	\$ (993,101)	\$ 80,811	\$ (25,808)	\$ (89,734)
Genetic Counseling	325	345	386	\$ 130,502	\$ 131,146	\$ 139,670	\$ 38,577	\$ 37,769	\$ 42,328	\$ 169,078	\$ 168,914	\$ 181,998	\$ (370,476)	\$ (382,181)	\$ (398,973)	\$ (77,308)	\$ (62,762)	\$ (89,793)	\$ (447,784)	\$ (444,944)	\$ (488,766)	\$ (278,706)	\$ (276,029)	\$ (306,768)
Human Devlp and Family Studies	11,996	12,413	13,546	\$ 1,764,868	\$ 1,850,131	\$ 1,973,414	\$ 1,749,818	\$ 1,800,271	\$ 2,589,391	\$ 3,514,686	\$ 3,650,401	\$ 4,562,805	\$ (4,211,505)	\$ (4,251,528)	\$ (4,269,275)	\$ (181,959)	\$ (175,577)	\$ (212,323)	\$ (4,393,464)	\$ (4,427,104)	\$ (4,481,599)	\$ (878,778)	\$ (776,703)	\$ 81,206
Kinesiology	18,883	17,699	17,796	\$ 3,094,140	\$ 2,908,956	\$ 2,886,287	\$ 1,448,913	\$ 1,312,012	\$ 1,820,088	\$ 4,543,053	\$ 4,220,868	\$ 4,706,375	\$ (4,130,931)	\$ (4,012,157)	\$ (4,169,106)	\$ (513,793)	\$ (483,138)	\$ (684,352)	\$ (4,644,725)	\$ (4,495,295)	\$ (4,853,458)	\$ (1,016,711)	\$ (274,427)	\$ (147,083)
Nutrition	7,351	7,627	7,547	\$ 1,135,671	\$ 1,194,292	\$ 1,181,558	\$ 580,775	\$ 698,427	\$ 804,381	\$ 1,716,446	\$ 1,892,719	\$ 1,985,939	\$ (1,823,353)	\$ (1,892,558)	\$ (1,870,893)	\$ (156,932)	\$ (164,042)	\$ (111,417)	\$ (1,980,278)	\$ (2,056,600)	\$ (1,982,310)	\$ (162,831)	\$ (163,851)	\$ 3,630
Peace and Conflict Studies	3,587	3,380	3,356	\$ 624,030	\$ 550,441	\$ 532,044	\$ 378,429	\$ 330,806	\$ 438,172	\$ 1,002,459	\$ 881,246	\$ 970,216	\$ (865,001)	\$ (875,679)	\$ (790,873)	\$ (37,443)	\$ (18,921)	\$ (43,477)	\$ (90					

**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#)  
**Cc:** [Bob Shea](#); [J. Boyette](#)  
**Subject:** UNCG/rpk Department Financial Data  
**Date:** Thursday, July 20, 2023 4:22:48 PM  
**Attachments:** [Outlook-gmztlu4o.png](#)

---

Hi Debbie,

Alan, Raven, and I had a great conversation today regarding the best format to share department-level financial data with academic deans. We've settled on a version of the table that we shared with you and Bob earlier this week. We'll update that table with information regarding methodology and definitions. Providing the deans with the numbers, rather than multiple visuals of numbers (as the Powerpoint was trending toward) should allow their focus to remain steady.

I would recommend that the table shows only student credit hours, tuition & fees, personnel expenses, and non-personnel expenses. This provides clarity into revenues directly produced by units (tuition and fees driven by SCH) and the expenses for those units. By removing allocated state appropriations and academic net revenue we're focusing on the financial elements that Deans/Chairs have the most control over.

Appreciate your insights and reactions,

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Debbie Storrs](#)  
**To:** [Mike Daly](#)  
**Cc:** [Bob Shea](#); [J. Boyette](#); [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Department Financial Data  
**Date:** Thursday, July 20, 2023 4:54:37 PM  
**Attachments:** [Outlook-gmztlu4o.png](#)

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Hi all,

The recommendation is not one I agree with Mike. I need us to include state appropriations and academic net revenue for reasons we've discussed.

Thank you,

Debbie

Provost & Executive Vice Chancellor  
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336.334.5494  
<https://provost.uncg.edu/>

---

**From:** Mike Daly <mdaly@rpkgroup.com>  
**Sent:** Thursday, July 20, 2023 4:22 PM  
**To:** Debbie Storrs <dastorrs@uncg.edu>  
**Cc:** Bob Shea <r\_shea@uncg.edu>; J. Boyette <jaboyett@uncg.edu>  
**Subject:** UNCG/rpk Department Financial Data

Hi Debbie,

Alan, Raven, and I had a great conversation today regarding the best format to share department-level financial data with academic deans. We've settled on a version of the table that we shared with you and Bob earlier this week. We'll update that table with information regarding methodology and definitions. Providing the deans with the numbers, rather than multiple visuals of numbers (as the Powerpoint was trending toward) should allow their focus to remain steady.

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Mike Daly

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**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#); [Debbie Storrs](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Memo - word doc  
**Date:** Wednesday, July 19, 2023 8:59:10 AM  
**Attachments:** [UNCG HR Analyses Summary Memo\\_DRAFT\\_7.18.23.docx](#)

---

Hi Bob and Debbie,

Thanks for the good conversation this morning. Attached is the memo as a word document for your ease of providing feedback.

Best,  
Katie

**rp**k GROUP  
from mission to market

Katie Hagan | Principal | [rp](#)k GROUP

626C Admiral Drive, Suite 511, Annapolis, MD 21401

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**University of North Carolina Greensboro**  
**Human Resources Analyses to Support Administrative Cost Savings**  
**July 18, 2023**

**Background**

University of North Carolina Greensboro (UNCG) partnered with rpk GROUP (rpk) for a comprehensive project to develop a framework and database for academic portfolio and resource evaluation, as well as to support analyses to lead to administrative cost savings. To support UNCG’s efforts to identify administrative cost savings, Katie Hagan from rpk participated in the Chancellor’s Task Force on Financial Sustainability, and rpk fielded a feedback survey to surface ideas for the Task Force and provided feedback and guidance throughout the Task Force meetings as recommendations emerged. One of the key recommendations of the Task Force was to take a closer look at the staffing levels at UNCG, ideally with the goal of achieving financial savings over time through strategic staffing reorganization. This memo captures additional analyses provided by rpk and makes more specific recommendations as to how UNCG can begin working towards strategic reorganization and alignment of staffing to the reduced student population that UNCG now serves.

The recommendations below are informed by a review of the current organizational structure and staffing levels. The data used were 2023 organizational charts as well as a July 2023 all employee report. In addition to quantitative and personnel data, rpk reviewed the results of the campus survey that was fielded in support of the Task Force, and drew upon the firm’s experiences working with UNCG for the last eight months.

**Recommendations**

The recommendations from rpk are as follows:

1. Shared Services - Implement a shared services model for administrative support staff, focusing initially on academic affairs.
2. Restructure of Key Functions - Redesign of business officer, marketing and communications, and facilities functions and roles to achieve efficiency.
3. Spans and Layers - Monitor UNCG institutional span of control and increase the span over time.

*1. Shared Services Approach to Admin Support Roles*

Within the education sector nationally, there is a move to create, redesign and expand shared services models. These models provide greater efficiency and reduced cost, while maintaining or enhancing service delivery. Standardizing and optimizing processes and workflow are essential components of shared services’ success. The streamlined workflow will support an emphasis on continuous business process improvement through automation, process expertise, and data analysis. We believe that shared services can offer a more effective and efficient approach to service delivery for administrative support across UNCG, improving service provider-client relationships and focusing on accountability. A potential option to explore is to first pilot this approach in Academic Affairs, then spread that approach across the institution over time.

*Table 1: Admin Support Roles Compared to All Employees Across UNCG*

	<b>Admin Support FTE</b>	<b>Total Employees*</b>
Academic Affairs	80	754
Chancellor	1	56
Enrollment Management	5	95

Finance and Administration	25	488
Information Technology Services	2	142
Intercollegiate Athletics	1	77
Research and Engagement	1	235
Student Affairs	15	279
University Advancement	6	64

*\*Faculty, temporary staff, and student workers are not captured in total employees; total employees do include funded vacancies*

Across the Academic Affairs division, there are a total of 80 administrative support full-time equivalents (FTEs) to support a division of 754 employees. The administrative support staff are spread out across all departments, with departments having between one and three individuals in those roles. This ratio of administrative support to other employees is one of the lowest across all divisions and points to an opportunity to better manage that investment in administrative support.

Delivery of administrative support services could be made more efficient by having personnel work across departments in a shared service model. A shared service model of this kind would improve service, allowing staff to be flexible and respond to shifting priorities, while ultimately reducing staff over time through natural attrition and workload efficiencies. A shared service model also provides opportunities for individuals to gain new or different experiences and opportunities for professional growth as they support multiple units.

## 2. Organizational Structure Redesign Opportunities

Simplifying the organization structure across various departments aims to increase the flow of ideas and decisions and streamline workflow across each team and down into the institution while also reducing costs. Based on a review of the 2023 organizational charts across all of UNCG, and confirmed by the June 2023 all employee data, below are opportunities for improved functional alignment and potential efficiencies if backfilling some of these roles is managed strategically:

- a. **Business Officers:** There are 33 business managers, business officers, and business services coordinators within academic affairs, and an additional 27 spread across the rest of the institution. These roles are critical for financial management, but this level of decentralization in a financial role can create challenges for the university. Specifically, if not managed very carefully, units will operate independent of one another and create unique and inconsistent business processes. rpk saw this firsthand when working with academic affairs to understand the cost of departmental operations – different colleges had different practices when it came to booking particular expenses, which made an apples-to-apples comparison challenging and manual to create. UNCG should determine if this level of decentralized financial support for units is desirable and strategic. If it is not, efforts should be made to create a more centralized pool of financial support personnel, reporting up through the Vice Chancellor for Finance and Administration. Following administrative support, this function is the clearest area of opportunity for shared services for UNCG.
- b. **Marketing and Communication Roles:** While there is a central marketing and communications staff that serves the university, a few other units operate their own teams of marketing and communication support, such as advancement, athletics, housing and residence life, campus activities and programs, enrollment management, the school of nursing, and the office of research and engagement. Like the decentralized business function above, UNCG should assess whether maintaining duplicative and decentralized marketing and communication roles supports the institution in achieving the ideal level of marketing and communication support. This level of decentralization could hinder consistency in branding and messaging. UNCG should determine whether

resources could be reclaimed centrally to serve the entire university community more effectively, reporting up through the Vice Chancellor for Strategic Communication.

- c. **Facilities:** UNCG has a robust facilities staff with some specialization – most notably an in-house architect and at least seven in-house engineers. UNCG also operates two different facilities staffs, one within finance and administration, and another within student affairs. Collectively, UNCG has more than 250 employees supporting the maintenance and upkeep of the buildings and grounds. This is a significant investment. UNCG should do its due diligence and ensure this level of investment is in line with industry standards.

### 3. Monitor UNCG Span of Control and Increase Over Time

Span of control refers to the number of direct reports a manager supervises. Over time, complexity creeps into institutions and layers accumulate, increasing the distance between leadership and the front line. Higher education benchmarks include average spans of 6–7 for expertise-based functions and average spans of 11–13 for task-based functions.

Creating higher spans drives effectiveness (higher value) by:

- Streamlining processes for more effective execution
- Focusing supervisors on highest-value work
- Empowering direct reports

Creating higher spans drives efficiency (lower cost) by:

- Eliminating redundant or lower-value supervisory activities (i.e., time spent communicating up and down the chain of command)
- Identifying and correcting for under-utilization of supervisory resources

The data used to calculate spans and layers savings for UNCG was submitted in June 2023. The data includes budgeted vacancies. The data also excludes faculty (but includes deans, directors, and coordinators), student workers, and temporary employees.

*Table 2: Spans and Layers Analysis of UNCG, July 2023*

Division	Supervisors	Total Employees	Span of Control
Academic Affairs	252	754	3.0
Chancellor	22	56	2.5
Enrollment Management	29	95	3.3
Finance and Administration	93	488	5.2
Information Technology Services	22	142	6.4
Intercollegiate Athletics	25	77	3.1
Research and Engagement	52	235	4.5
Student Affairs	73	279	3.8
University Advancement	22	64	2.9
	590	2,189	3.7

UNCG operates at a span of control of four – meaning that, across the institution, the average supervisor oversees four direct reports. However, this varies widely by division and within departments. UNCG should monitor this metric as part of the effort to strategically realign staffing plans in response to lower student enrollment and identify opportunities to reduce managerial structures and increase spans of control for appropriate functions.

Based on a review of organizational charts at UNCG and confirmed in the review of the June 2023 all employee report, the following areas stood out as having many managers or leaders (based on title), and relatively few direct reports:

1. Academic Achievement Center – one senior assistant director and four assistant directors, with only two support staff
2. Dean of Students – five total assistant or associate deans with no direct reports
3. Undergraduate Admissions – a total of 13 assistant and associate directors for an entire staff of only 29

### **Conclusion**

UNCG has invested considerable time and energy into assessing its resource allocations (people, time and money) and opportunities to maintain or enhance services while reducing costs. Achieving those opportunities will largely impact positions at UNCG. The review summarized above provides a roadmap and a set of tools that UNCG can use to design a new organization structure and the path to achieve that structure. This includes a move to shared services models and an ongoing review of spans and layers.

It will be important to separate the desired end state from the process and timing for implementing that end state. Meaning, UNCG can elect to move toward a new organization structure and related efficiencies more organically as vacancies emerge, or it can move more quickly to reallocate resources. These two approaches reflect a tradeoff between speed and the capture of cost savings.

**From:** [Debbie Storrs](#)  
**To:** [Katie Hagan](#); [Bob Shea](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Memo - word doc  
**Date:** Wednesday, July 19, 2023 3:39:56 PM  
**Attachments:** [UNCG HR Analyses Summary Memo DRAFT 7.18.23 \(AB+DS edits\).docx](#)

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Katie and Mike  
See attached document with Alan and my edits.  
Hope this is helpful.  
Debbie

Provost & Executive Vice Chancellor  
University of North Carolina Greensboro  
201 Mossman Building  
Greensboro, NC 27412  
[dastorrs@uncg.edu](mailto:dastorrs@uncg.edu)  
336.334.5494  
<https://provost.uncg.edu/>

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**From:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Sent:** Wednesday, July 19, 2023 8:58 AM  
**To:** Bob Shea <[r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)>; Debbie Storrs <[dastorrs@uncg.edu](mailto:dastorrs@uncg.edu)>  
**Cc:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Subject:** Memo - word doc

Hi Bob and Debbie,

Thanks for the good conversation this morning. Attached is the memo as a word document for your ease of providing feedback.

Best,  
Katie

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from mission to market

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**University of North Carolina Greensboro**  
**Human Resources Analyses to Support Administrative Cost Savings**  
**July 18, 2023**

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The recommendations below are informed by a review of the current organizational structure and staffing levels. The data used were 2023 organizational charts as well as a July 2023 all employee report. In addition to quantitative and personnel data, rpk reviewed the results of the campus survey that was fielded in support of the Task Force, and drew upon the firm's experiences working with UNCG for the last eight months. Implementation of these recommendations would result in substantial savings for UNCG over time; however, the present analysis confirms that the Task Force's estimate of \$10 million to \$18 million in savings through strategic reorganization of staffing is grossly overstated. In addition, it should be noted that the Task Force report does not consider the extensive period of time required for savings to accrue.

**Recommendations**

The recommendations from rpk are as follows:

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**Commented [DS1]:** I would delete the second part of this sentence.

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Delivery of administrative support services could be made more efficient by having personnel work across departments in a shared service model. We recognize there are cases across the university in which this is occurring but a broader application of a shared service model of this kind would provide core services through a centralized office, improve service, and allowing administrative staff within to be more flexible and responsive to shifting priorities, while ultimately reducing staff over time through natural attrition and workload efficiencies. A shared service model also provides opportunities for individuals to gain new or different experiences and opportunities for professional growth as they support multiple units.

**Commented [JB2]:** I think we should avoid suggesting that shared services will improve service, since it's typical for service disruptions to occur in the transition phase and to continue for some time before processes ultimately become more effective.

## 2. Organizational Structure Redesign Opportunities

Simplifying the organization structure across various departments aims to increase the flow of ideas and decisions and streamline workflow across each team and down into the institution while also reducing costs. Based on a review of the 2023 organizational charts across all of UNCG, and confirmed by the June 2023 all employee data, below are potential opportunities for improved functional alignment and potential efficiencies if backfilling some of these roles is managed strategically:

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- c. **Facilities:** UNCG has a robust facilities staff with some specialization – most notably an in-house architect and at least seven in-house engineers. UNCG also operates two different facilities staffs, one within finance and administration, and another within student affairs. Collectively, UNCG has more than 250 employees supporting the maintenance and upkeep of the buildings and grounds. This is a significant investment. UNCG should do its due diligence and ensure this level of investment is in line with industry standards.

### 3. Monitor UNCG Span of Control and Increase Over Time

Span of control refers to the number of direct reports a manager supervises. Over time, greater levels of complexity in job functions commonly leads to the accumulation of management layers ~~creeps into institutions and layers accumulate~~, increasing the distance between leadership and the front line. Higher education benchmarks include average spans of 6–7 for expertise-based functions and average spans of 11–13 for task-based functions.

Creating higher spans drives effectiveness (higher value) by:

- Streamlining processes for more effective execution
- Focusing supervisors on highest-value work
- Empowering direct reports

Creating higher spans drives efficiency (lower cost) by:

- Eliminating redundant or lower-value supervisory activities (i.e., time spent communicating up and down the chain of command)
- Identifying and correcting for under-utilization of supervisory resources

The data used to calculate spans and layers savings for UNCG was submitted in June 2023. The data includes budgeted vacancies. The data also excludes faculty (but includes deans, directors, and coordinators), student workers, and temporary employees.

Table 2: Spans and Layers Analysis of UNCG, July 2023

Division	Supervisors	Total Employees	Span of Control
Academic Affairs	252	754	3.0
Chancellor	22	56	2.5
Enrollment Management	29	95	3.3
Finance and Administration	93	488	5.2
Information Technology Services	22	142	6.4
Intercollegiate Athletics	25	77	3.1
Research and Engagement	52	235	4.5
Student Affairs	73	279	3.8
University Advancement	22	64	2.9

	590	2,189	3.7
--	-----	-------	-----

UNCG operates at a span of control of four – meaning that, across the institution, the average supervisor oversees four direct reports. However, this varies widely by division and within departments. UNCG should monitor this metric as part of the effort to strategically realign staffing plans in response to lower student enrollment and identify opportunities to reduce managerial structures and increase spans of control for appropriate functions.

Based on a review of organizational charts at UNCG and confirmed in the review of the June 2023 all employee report, the following areas stood out as having many managers or leaders (based on title), and relatively few direct reports:

1. Academic Achievement Center – one senior assistant director and four assistant directors, with only two support staff
2. Dean of Students – five total assistant or associate deans with no direct reports
3. Undergraduate Admissions – a total of 13 assistant and associate directors for an entire staff of only 29

#### Conclusion

UNCG has invested considerable time and energy into assessing its resource allocations (people, time and money) and opportunities to maintain or enhance services while reducing costs. Achieving those opportunities will largely impact positions at UNCG. The review summarized above provides a roadmap and a set of tools that UNCG can use to design a new organization structure and the path to achieve that structure. This includes a move to shared services models and an ongoing review of spans and layers.

It will be important to separate the desired end state from the process and timing for implementing that end state. Meaning, UNCG can elect to move toward a new organization structure and related efficiencies more organically as vacancies emerge, or it can move more quickly to reallocate resources. These two approaches reflect a tradeoff between speed and the capture of cost savings.

**From:** [Katie Hagan](#)  
**To:** [Debbie Storrs](#); [Bob Shea](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Memo - word doc  
**Date:** Wednesday, July 19, 2023 3:43:47 PM

---

Thanks, Debbie! I am not comfortable with Alan's edit related to the task force, but the rest look fine.

---

**From:** Debbie Storrs <DASTORRS@uncg.edu>  
**Sent:** Wednesday, July 19, 2023 3:39 PM  
**To:** Katie Hagan <khagan@rpkgroup.com>; Bob Shea <r\_shea@uncg.edu>  
**Cc:** Mike Daly <mdaly@rpkgroup.com>  
**Subject:** Re: Memo - word doc

Katie and Mike  
See attached document with Alan and my edits.  
Hope this is helpful.  
Debbie

Provost & Executive Vice Chancellor  
University of North Carolina Greensboro  
201 Mossman Building  
Greensboro, NC 27412  
[dastorrs@uncg.edu](mailto:dastorrs@uncg.edu)  
336.334.5494  
<https://provost.uncg.edu/>

---

**From:** Katie Hagan <khagan@rpkgroup.com>  
**Sent:** Wednesday, July 19, 2023 8:58 AM  
**To:** Bob Shea <r\_shea@uncg.edu>; Debbie Storrs <dastorrs@uncg.edu>  
**Cc:** Mike Daly <mdaly@rpkgroup.com>  
**Subject:** Memo - word doc

Hi Bob and Debbie,

Thanks for the good conversation this morning. Attached is the memo as a word document for your ease of providing feedback.

Best,  
Katie

# rpk GROUP

from mission to market

Katie Hagan | Principal | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490

**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#)  
**Cc:** [Bob Shea](#); [Katie Hagan](#)  
**Subject:** UNCG/rpk - Financial Analysis Next Steps  
**Date:** Wednesday, July 19, 2023 1:10:26 PM  
**Attachments:** [Outlook-t2vcuij2.png](#)

---

Hi Debbie,

Katie and I had a chance to debrief our conversation with you this morning. Rather than make immediate changes to the visuals in the presentation, I'm going to schedule time with Alan as soon as possible to discuss the best scenario for a strategic roll-out of the financial information. Our goal is to ensure we are providing an opportunity for Deans and Department Chairs to understand the data and take appropriate action.

Thanks again,  
Mike Daly

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from mission to market

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mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Debbie Storrs](#)  
**To:** [Mike Daly](#)  
**Cc:** [Bob Shea](#); [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk - Financial Analysis Next Steps  
**Date:** Wednesday, July 19, 2023 1:17:58 PM  
**Attachments:** [Outlook-t2vcuij2.png](#)

---

Mike,  
The July 26 2:30 in NIB 120 session is what I'm referring to!  
Debbie

---

**From:** Debbie Storrs <DASTORRS@uncg.edu>  
**Sent:** Wednesday, July 19, 2023 1:11:57 PM  
**To:** Mike Daly <mdaly@rpkgroup.com>  
**Cc:** Bob Shea <r\_shea@uncg.edu>; Katie Hagan <khagan@rpkgroup.com>  
**Subject:** Re: UNCG/rpk - Financial Analysis Next Steps

Okay, can this be included at the deans workshop?

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---

**From:** Mike Daly <mdaly@rpkgroup.com>  
**Sent:** Wednesday, July 19, 2023 1:10:17 PM  
**To:** Debbie Storrs <dastorrs@uncg.edu>  
**Cc:** Bob Shea <r\_shea@uncg.edu>; Katie Hagan <khagan@rpkgroup.com>  
**Subject:** UNCG/rpk - Financial Analysis Next Steps

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**From:** [Debbie Storrs](#)  
**To:** [Mike Daly](#)  
**Cc:** [Bob Shea](#); [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk - Financial Analysis Next Steps  
**Date:** Wednesday, July 19, 2023 1:12:02 PM  
**Attachments:** [Outlook-t2vcuij2.png](#)

---

Okay, can this be included at the deans workshop?

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---

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**Sent:** Wednesday, July 19, 2023 1:10:17 PM  
**To:** Debbie Storrs <dastorrs@uncg.edu>  
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**Subject:** UNCG/rpk - Financial Analysis Next Steps

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626C Admiral Drive, Suite 511, Annapolis, MD 21401  
mdaly@rpkgroup.com | Cell: 518-796-2209



**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#)  
**Cc:** [Bob Shea](#); [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk - Financial Analysis Next Steps  
**Date:** Wednesday, July 19, 2023 2:27:09 PM  
**Attachments:** [Outlook-t2vcuij2.png](#)

---

Thanks, Debbie. I'll let you know of potential next steps after Alan, Raven, and I talk tomorrow.

More soon,  
Mike DALy  
rpk GROUP

---

**From:** Debbie Storrs <DASTORRS@uncg.edu>  
**Sent:** Wednesday, July 19, 2023 1:17 PM  
**To:** Mike Daly <mdaly@rpkgroup.com>  
**Cc:** Bob Shea <r\_shea@uncg.edu>; Katie Hagan <khagan@rpkgroup.com>  
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Thanks again,

Mike Daly

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mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#)  
**Cc:** [Bob Shea](#); [J. Boyette](#)  
**Subject:** UNCG/rpk Department Financial Data  
**Date:** Thursday, July 20, 2023 4:22:48 PM  
**Attachments:** [Outlook-gmztlu4o.png](#)

---

Hi Debbie,

Alan, Raven, and I had a great conversation today regarding the best format to share department-level financial data with academic deans. We've settled on a version of the table that we shared with you and Bob earlier this week. We'll update that table with information regarding methodology and definitions. Providing the deans with the numbers, rather than multiple visuals of numbers (as the Powerpoint was trending toward) should allow their focus to remain steady.

I would recommend that the table shows only student credit hours, tuition & fees, personnel expenses, and non-personnel expenses. This provides clarity into revenues directly produced by units (tuition and fees driven by SCH) and the expenses for those units. By removing allocated state appropriations and academic net revenue we're focusing on the financial elements that Deans/Chairs have the most control over.

Appreciate your insights and reactions,

Thanks again,  
Mike Daly

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626C Admiral Drive, Suite 511, Annapolis, MD 21401  
mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Debbie Storrs](#)  
**To:** [Mike Daly](#)  
**Cc:** [Bob Shea](#); [J. Boyette](#); [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Department Financial Data  
**Date:** Thursday, July 20, 2023 4:54:37 PM  
**Attachments:** [Outlook-gmztlu4o.png](#)

---

Hi all,

The recommendation is not one I agree with Mike. I need us to include state appropriations and academic net revenue for reasons we've discussed.

Thank you,

Debbie

Provost & Executive Vice Chancellor  
University of North Carolina Greensboro  
201 Mossman Building  
Greensboro, NC 27412  
[dastorrs@uncg.edu](mailto:dastorrs@uncg.edu)  
336.334.5494  
<https://provost.uncg.edu/>

---

**From:** Mike Daly <mdaly@rpkgroup.com>  
**Sent:** Thursday, July 20, 2023 4:22 PM  
**To:** Debbie Storrs <dastorrs@uncg.edu>  
**Cc:** Bob Shea <r\_shea@uncg.edu>; J. Boyette <jaboyett@uncg.edu>  
**Subject:** UNCG/rpk Department Financial Data

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**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#)  
**Cc:** [Bob Shea](#); [J. Boyette](#); [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Department Financial Data  
**Date:** Friday, July 21, 2023 9:21:15 AM  
**Attachments:** [Outlook-gmztlu4o.png](#)

---

Thanks, Debbie. I appreciate the direct feedback.

We anticipate sharing the revised tables with you all on Monday in preparation for sharing them with Academic Deans on Wednesday.

Thanks again,  
Mike Daly  
rpk GROUP

---

**From:** Debbie Storrs <DASTORRS@uncg.edu>  
**Sent:** Thursday, July 20, 2023 4:54 PM  
**To:** Mike Daly <mdaly@rpkgroup.com>  
**Cc:** Bob Shea <r\_shea@uncg.edu>; J. Boyette <jaboyett@uncg.edu>; Katie Hagan <khagan@rpkgroup.com>  
**Subject:** Re: UNCG/rpk Department Financial Data

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**Sent:** Thursday, July 20, 2023 4:22 PM

**To:** Debbie Storrs <dastorrs@uncg.edu>

**Cc:** Bob Shea <r\_shea@uncg.edu>; J. Boyette <jaboyett@uncg.edu>

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**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Project Update and Financial Tables  
**Date:** Tuesday, July 25, 2023 4:51:30 PM  
**Attachments:** [Outlook-r3ctq5rn.png](#)

---

Hi Debbie,

Just checking in regarding my showing the financial data tables with Academic Deans tomorrow - I don't want to get ahead of any plans you and your team have for sharing this information.

Thanks again,  
Mike Daly  
rpk GROUP

---

**From:** Mike Daly  
**Sent:** Monday, July 24, 2023 12:51 PM  
**To:** Debbie Storrs <dastorrs@uncg.edu>; Bob Shea <r\_shea@uncg.edu>  
**Cc:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** UNCG/rpk Weekly Project Update and Financial Tables

Hi Debbie and Bob,

Attached is the weekly project update tracker for your review. I held on sharing it today to ensure that these updates were present:

- Katie met with Jeanne on Friday and finalized the HR data in the draft ASR report shared earlier. Katie will share a final report with you this week.
- The rpk team is meeting with Karen Blackwell on Thursday to review her questions regarding the approach to the market analysis. That conversation will further inform how we structure an appropriate response to issues raised by the Provost's Portfolio Review Taskforce.
- Department-level data tables have been created and attached to this email.
  - Please confirm that you'd like rpk/Mike to show this to the Academic Deans on 7/26.

Thanks again,  
Mike Daly

**rpk** GROUP

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Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Debbie Storrs](#)  
**To:** [Mike Daly](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Project Update and Financial Tables  
**Date:** Tuesday, July 25, 2023 6:51:00 PM  
**Attachments:** [Outlook-r3ctg5rn.png](#)

---

Hi Mike,  
Yes, please share with deans tomorrow.  
I plan to attend. Thank for checking!  
Debbie

---

**From:** Mike Daly <mdaly@rpkgroup.com>  
**Sent:** Tuesday, July 25, 2023 4:51 PM  
**To:** Debbie Storrs <dastorrs@uncg.edu>; Bob Shea <r\_shea@uncg.edu>  
**Cc:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** Re: UNCG/rpk Weekly Project Update and Financial Tables

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rpk GROUP

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Thanks again,

Mike Daly

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**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#); [Debbie Storrs](#); [Jeanne Madorin](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Updated Memo  
**Date:** Thursday, July 27, 2023 1:19:53 PM  
**Attachments:** [UNCG HR Analyses Summary Memo 7.27.23.docx](#)

---

Hi Bob, Debbie and Jeanne,

I hope you all are having a nice week. Attached is an updated version of the memo to reflect all of your excellent feedback. After speaking with Jeanne, the one larger shift was combining the recommendation about business officers with the administrative support shared service recommendation given the overlap in the responsibilities across those roles in practice. This moves the recommendation from just sharing/pooling admins, to being more strategic about defining the functions you expect those administrative support-type roles to perform and organizing shared services around those.

Let me know if you have any questions. I'll plan to send this to Dr. Gilliam on Monday unless I hear otherwise from you all.

Best,  
Katie

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626C Admiral Drive, Suite 511, Annapolis, MD 21401

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**University of North Carolina Greensboro**  
**Human Resources Analyses to Support Administrative Cost Savings**  
**July 27, 2023**

### **Background**

University of North Carolina Greensboro (UNCG) partnered with rpk GROUP (rpk) for a comprehensive project to develop a framework and database for academic portfolio and resource evaluation, as well as to support analyses to lead to administrative cost savings. To support UNCG's efforts to identify administrative cost savings, Katie Hagan from rpk participated in the Chancellor's Task Force on Financial Sustainability, and rpk fielded a feedback survey to surface ideas for the Task Force and provided feedback and guidance throughout the Task Force meetings as recommendations emerged. One of the key recommendations of the Task Force was to take a closer look at the staffing levels at UNCG, ideally with the goal of achieving financial savings over time through strategic staffing reorganization. This memo captures additional analyses provided by rpk and makes more specific recommendations as to how UNCG can begin working towards strategic reorganization and alignment of staffing to the reduced student population that UNCG now serves.

The recommendations below are informed by a review of the current organizational structure and staffing levels. The data used were 2023 organizational charts as well as a July 2023 all employee report. In addition to quantitative and personnel data, rpk reviewed the results of the campus survey that was fielded in support of the Task Force, and drew upon the firm's experiences working with UNCG for the last eight months.

### **Recommendations**

The recommendations from rpk are as follows:

1. Shared Services - Implement a shared services model for administrative support staff, focusing initially on academic affairs.
2. Restructure of Key Functions - Redesign of business officer, marketing and communications, and facilities functions and roles to achieve efficiency.
3. Spans and Layers - Monitor UNCG institutional span of control and increase the span over time.

#### **1. Shared Services Approach to Administrative Support Functions**

Within the education sector nationally, there is a move to create, redesign and expand shared services models. These models provide greater efficiency and reduced cost, while aiming to maintain and more equitably distribute service delivery. Standardizing and optimizing processes and workflow are essential components of shared services' success. The streamlined workflow will support an emphasis on continuous business process improvement through automation, process expertise, and data analysis. Shared services can offer a more effective and efficient approach to service delivery for administrative support functions, such as business processes, human resources processes, and scheduling. Meaning, instead of every unit having their own business officer and administrative assistant, a central unit is created that would provide the services typically performed by those roles and existing personnel move into that shared unit. This central unit would then organize into administrative functions, shifting the role of the administrative assistant or business officer from needing to be knowledgeable about all HR, finance, and operational functions, to creating more specialization in those support roles. These central functions operate with clear service agreements with the units that use their support, and have reporting relationships with the central office functions for which they are aligned (HR and finance) to ensure accuracy and consistency in workflows and processes.

We recommend that UNCG pilot this approach in Academic Affairs, then spread that approach across the institution over time if successful.

*Table 1: Admin and Business Function Support Roles Compared to All Employees Across UNCG*

	Admin Support FTE	Business Support FTE	Total Employees*
Academic Affairs	80	33	754
Chancellor	1	0	56
Enrollment Management	5	2	95
Finance and Administration	25	9	488
Information Technology Services	2	2	142
Intercollegiate Athletics	1	1	77
Research and Engagement	1	3	235
Student Affairs	15	9	279
University Advancement	6	1	64

*\*Faculty, temporary staff, and student workers are not captured in total employees; total employees do include funded vacancies*

Across the Academic Affairs division, there are a total of 80 administrative support full-time equivalents (FTEs) to support a division of 754 employees. In addition to the administrative support roles, there are also 33 business managers, business officers, and business support coordinators. All of these roles are spread out across all departments, with departments having between one and three individuals in those roles. This ratio of administrative support and business office-related positions to other employees is one of the lowest across all divisions and points to an opportunity to better manage that investment in administrative support.

Delivery of administrative support functions could be made more efficient by having personnel work across departments in a shared service model. A shared service model of this kind could improve service in the long term (once initial service disruptions that emerge with any change effort are resolved) and create a more equitable distribution of support functions. It could also allow staff to be flexible and respond to shifting priorities, while ultimately reducing staff over time through natural attrition and workload efficiencies. A shared service model provides opportunities for individuals to gain new or different experiences and opportunities for professional growth as they can specialize in a functional area and support multiple units with that specialization, which also helps reduce turnover in these essential roles.

2. Organizational Structure Redesign Opportunities

Simplifying the organization structure across various departments aims to increase the flow of ideas and decisions and streamline workflow across each team and down into the institution while also reducing costs. Based on a review of the 2023 organizational charts across all of UNCG, and confirmed by the June 2023 all employee data, below are potential opportunities for improved functional alignment and efficiencies if backfilling some of these roles is managed strategically:

- a. **Marketing and Communication Roles:** While there is a central marketing and communications staff that serves the university, a few other units operate their own teams of marketing and communication support, such as Advancement, Athletics, Housing and Residence Life, Campus Activities and Programs, Enrollment Management, the School of Nursing, and the Office of Research and Engagement. Like the decentralized business function above, UNCG should assess whether maintaining duplicative and decentralized marketing and communication

roles supports the institution in achieving the ideal level of marketing and communication support. This level of decentralization could hinder consistency in branding and messaging. UNCG should determine whether resources could be reclaimed centrally to serve the entire university community more effectively, reporting up through the Vice Chancellor for Strategic Communication.

- b. **Facilities:** UNCG has a robust facilities staff with some specialization – most notably an in-house architect and at least seven in-house engineers. UNCG also operates two different facilities staffs, one within finance and administration, and another within student affairs. Collectively, UNCG has more than 250 employees supporting the maintenance and upkeep of the buildings and grounds. This is a significant investment. UNCG should do its due diligence and ensure this level of investment is in line with industry standards.

### 3. Monitor UNCG Span of Control and Increase Over Time

Span of control refers to the number of direct reports a manager supervises. Over time, greater levels of complexity in job functions commonly leads to the accumulation of management layers, increasing the distance between leadership and the front line. Higher education benchmarks include average spans of 6–7 for expertise-based functions and average spans of 11–13 for task-based functions.

Creating higher spans drives effectiveness (higher value) by:

- Streamlining processes for more effective execution
- Focusing supervisors on highest-value work
- Empowering direct reports

Creating higher spans drives efficiency (lower cost) by:

- Eliminating redundant or lower-value supervisory activities (i.e., time spent communicating up and down the chain of command)
- Identifying and correcting for under-utilization of supervisory resources

The data used to calculate spans and layers savings for UNCG was submitted in June 2023. The data includes budgeted vacancies. The data also excludes faculty (but includes deans, directors, and coordinators), student workers, and temporary employees.

*Table 2: Spans and Layers Analysis of UNCG, July 2023*

Division	Supervisors	Total Employees	Span of Control
Academic Affairs	252	754	3.0
Chancellor	22	56	2.5
Enrollment Management	29	95	3.3
Finance and Administration	93	488	5.2
Information Technology Services	22	142	6.4
Intercollegiate Athletics	25	77	3.1
Research and Engagement	52	235	4.5
Student Affairs	73	279	3.8
University Advancement	22	64	2.9
	590	2,189	3.7

UNCG operates at a span of control of four – meaning that, across the institution, the average supervisor oversees four direct reports. However, this varies widely by division and within departments. UNCG should monitor this metric as part



of the effort to strategically realign staffing plans in response to lower student enrollment and identify opportunities to reduce managerial structures and increase spans of control for appropriate functions.

Based on a review of organizational charts at UNCG and confirmed in the review of the June 2023 all employee report, the following areas stood out as having many managers or leaders (based on title), and relatively few direct reports:

1. Academic Achievement Center – one senior assistant director and four assistant directors, with only two support staff
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### **Conclusion**

UNCG has invested considerable time and energy into assessing its resource allocations (people, time and money) and opportunities to maintain or enhance services while reducing costs. Achieving those opportunities will largely impact positions at UNCG. The review summarized above provides a roadmap and a set of tools that UNCG can use to design a new organization structure and the path to achieve that structure. This includes a move to shared services models and an ongoing review of spans and layers.

It will be important to separate the desired end state from the process and timing for implementing that end state. Meaning, UNCG can elect to move toward a new organization structure and related efficiencies more organically as vacancies emerge, or it can move more quickly to reallocate resources. These two approaches reflect a tradeoff between speed and the capture of cost savings.

**From:** [Bob Shea](#)  
**To:** [Debbie Storrs](#); [Katie Hagan](#); [Jeanne Madorin](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Updated Memo  
**Date:** Thursday, July 27, 2023 2:36:22 PM

---

No changes from me.

---

**From:** Debbie Storrs <DASTORRS@uncg.edu>  
**Date:** Thursday, July 27, 2023 at 1:44 PM  
**To:** Katie Hagan <khagan@rpkgroup.com>, Bob Shea <r\_shea@uncg.edu>, Jeanne Madorin <J\_MADORI@uncg.edu>  
**Cc:** Mike Daly <mdaly@rpkgroup.com>  
**Subject:** Re: Updated Memo

Hi Katie,

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Debbie

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336.334.5494  
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**From:** Katie Hagan <khagan@rpkgroup.com>  
**Sent:** Thursday, July 27, 2023 1:18 PM  
**To:** Bob Shea <r\_shea@uncg.edu>; Debbie Storrs <dastorrs@uncg.edu>; Jeanne Madorin <J\_MADORI@uncg.edu>  
**Cc:** Mike Daly <mdaly@rpkgroup.com>  
**Subject:** Updated Memo

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Let me know if you have any questions. I'll plan to send this to Dr. Gilliam on Monday unless I hear otherwise from you all.

Best,  
Katie

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626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490

**From:** [Debbie Storrs](#)  
**To:** [Katie Hagan](#); [Bob Shea](#); [Jeanne Madorin](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Updated Memo  
**Date:** Thursday, July 27, 2023 1:44:48 PM

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**Sent:** Thursday, July 27, 2023 1:18 PM  
**To:** Bob Shea <[r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)>; Debbie Storrs <[dastorrs@uncg.edu](mailto:dastorrs@uncg.edu)>; Jeanne Madorin <[J\\_MADORI@uncg.edu](mailto:J_MADORI@uncg.edu)>  
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**To:** [Katie Hagan](#); [Bob Shea](#); [Jeanne Madorin](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Updated Memo  
**Date:** Saturday, July 29, 2023 7:03:40 AM

---

Good morning. I suggest you send directly to Frank. Have a great weekend.  
Debbie

---

**From:** Katie Hagan <khagan@rpkgroup.com>  
**Sent:** Saturday, July 29, 2023 6:42 AM  
**To:** Bob Shea <R\_SHEA@uncg.edu>; Debbie Storrs <dastorrs@uncg.edu>; Jeanne Madorin <J\_MADORI@uncg.edu>  
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**Sent:** Thursday, July 27, 2023 2:36 PM  
**To:** Debbie Storrs <DASTORRS@uncg.edu>; Katie Hagan <khagan@rpkgroup.com>; Jeanne Madorin <J\_MADORI@uncg.edu>  
**Cc:** Mike Daly <mdaly@rpkgroup.com>  
**Subject:** Re: Updated Memo

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**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Project Update  
**Date:** Friday, July 28, 2023 11:46:37 AM  
**Attachments:** [Outlook-shgzni3.png](#)

---

Hi Debbie and Bob,

I'm shifting to a short email update this week, please let me know if you have any questions.

Activity this Week:

- Academic Deans received their first introduction to the dashboard and financial tables (7/26).
  - Overall, great engagement and participation by the Deans during the session as well as follow-up inquiries via email.
- Katie shared the final ASR report (7/27).
- rpk met with Karen Blackwell to review the approach to the Market Demand analysis and discussed appropriate next steps (7/27).
  - Karen was appreciative of the time and opportunity to learn more and shared some concerns from the PRTF.
  - rpk will generate a revised narrative of the analysis that provides deeper methodological explanations and remove recommendations regarding Mental Health Counseling.
  - Mike will contact Kelly Wester (Chair of PRTF) to inquire about an appropriate time for rpk to provide the PRTF with more context regarding the methodology utilized for the Market Demand analysis.

Upcoming:

- Mike and Debbie are meeting to review the PRTF's rubric (8/3).
- Katie is joining Andrew Hamilton at the Faculty Senate retreat to introduce the dashboard (8/11).

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
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**From:** [Debbie Storrs](#)  
**To:** [Mike Daly](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Project Update  
**Date:** Friday, July 28, 2023 11:52:14 AM  
**Attachments:** [Outlook-shgzni3.png](#)

---

Thanks Mike,  
Appreciate your engagement with the deans!  
Talk with you next week,  
Debbie

Provost & Executive Vice Chancellor  
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Greensboro, NC 27412  
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336.334.5494  
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---

**From:** Mike Daly <mdaly@rpkgroup.com>  
**Sent:** Friday, July 28, 2023 11:46 AM  
**To:** Debbie Storrs <dastorrs@uncg.edu>; Bob Shea <r\_shea@uncg.edu>  
**Cc:** Katie Hagan <khagan@rpkgroup.com>  
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**From:** [Bob Shea](#)  
**To:** [Debbie Storrs](#); [Katie Hagan](#); [Jeanne Madorin](#)  
**Cc:** [Mike Daly](#)  
**Subject:** Re: Updated Memo  
**Date:** Monday, July 31, 2023 6:17:43 AM

---

Agree with Debbie.

Get [Outlook for iOS](#)

---

**From:** Debbie Storrs <DASTORRS@uncg.edu>  
**Sent:** Saturday, July 29, 2023 7:03:34 AM  
**To:** Katie Hagan <khagan@rpkgroup.com>; Bob Shea <R\_SHEA@uncg.edu>; Jeanne Madorin <J\_MADORI@uncg.edu>  
**Cc:** Mike Daly <mdaly@rpkgroup.com>  
**Subject:** Re: Updated Memo

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**Sent:** Saturday, July 29, 2023 6:42 AM  
**To:** Bob Shea <R\_SHEA@uncg.edu>; Debbie Storrs <dastorrs@uncg.edu>; Jeanne Madorin <J\_MADORI@uncg.edu>  
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**Sent:** Thursday, July 27, 2023 2:36 PM  
**To:** Debbie Storrs <DASTORRS@uncg.edu>; Katie Hagan <khagan@rpkgroup.com>; Jeanne Madorin <J\_MADORI@uncg.edu>  
**Cc:** Mike Daly <mdaly@rpkgroup.com>  
**Subject:** Re: Updated Memo

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**From:** Debbie Storrs <DASTORRS@uncg.edu>

**Date:** Thursday, July 27, 2023 at 1:44 PM

**To:** Katie Hagan <khagan@rpkgroup.com>, Bob Shea <r\_shea@uncg.edu>, Jeanne Madorin <J\_MADORI@uncg.edu>

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**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Project Update and Revised Market Analysis (for review)  
**Date:** Friday, August 11, 2023 10:25:58 AM  
**Attachments:** [Outlook-mvyhavrn.png](#)

---

Hi Debbie and Bob,

Short update this week, so no formal attachment for review. For your awareness:

- rpk will be sharing a short narrative to provide additional context to the financial tables. This was requested by Academic Deans as they work to ensure their constituents can understand the approach and how the tables can be informative.
- rpk will be meeting with UNCG IR on 8/14 to review the approach to the financial tables. This is in anticipation that IR will receive some questions related to the tables.
- In recognition of the official transfer of the academic dashboard to UNCG IR and the completed ASR work, I'll be turning off the [general project feedback form](#) next Friday (8/18)

Please let me know if you have any questions.

Thanks again,  
Mike Daly  
rpk GROUP

---

**From:** Mike Daly  
**Sent:** Friday, August 4, 2023 11:31 AM  
**To:** Debbie Storrs <dastorrs@uncg.edu>; Bob Shea <r\_shea@uncg.edu>  
**Cc:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** UNCG/rpk Weekly Project Update and Revised Market Analysis (for review)

Hi Debbie and Bob,

Attached is the weekly project tracker for your reference. Note that I've labeled the project's overall status as 'on-track/complete' to reflect the finished ASR work and remaining engagements/meetings related to the dashboards.

Also attached is the revised Market Analysis narrative. I'd encourage your review and any needed discussions with us before sharing on the project's site.

Have a great weekend!

Thanks again,  
Mike Daly

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Michael Daly | Senior Associate | [rpk GROUP](#)

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mdaly@rpkgroup.com | Cell: 518-796-2209

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**To:** [Mike Daly](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Project Update and Revised Market Analysis (for review)  
**Date:** Friday, August 11, 2023 2:07:14 PM  
**Attachments:** [Outlook-mvyhavrn.png](#)

---

Thanks Mike. I spoke briefly with Katie.

I'd also appreciate a FAQ document to accompany the revenue/expense data. Please send early next week for our review before we post.

Also, might we replace the red/green color of arrows and just have the arrows up or down?

Thanks much and have a great weekend,  
Debbie

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**From:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Sent:** Friday, August 11, 2023 10:25 AM  
**To:** Debbie Storrs <[dastorrs@uncg.edu](mailto:dastorrs@uncg.edu)>; Bob Shea <[r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)>  
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**Sent:** Friday, August 4, 2023 11:31 AM

**To:** Debbie Storrs <dastorrs@uncg.edu>; Bob Shea <r\_shea@uncg.edu>

**Cc:** Katie Hagan <khagan@rpkgroup.com>

**Subject:** UNCG/rpk Weekly Project Update and Revised Market Analysis (for review)

Hi Debbie and Bob,

Attached is the weekly project tracker for your reference. Note that I've labeled the project's overall status as 'on-track/complete' to reflect the finished ASR work and remaining engagements/meetings related to the dashboards.

Also attached is the revised Market Analysis narrative. I'd encourage your review and any needed discussions with us before sharing on the project's site.

Have a great weekend!

Thanks again,  
Mike Daly

**rpk** GROUP

from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Project Update and Revised Market Analysis (for review)  
**Date:** Friday, August 11, 2023 2:36:47 PM  
**Attachments:** [Outlook-mvyhavrn.png](#)

---

Thanks, Debbie.

Happy to accommodate both requests. I will work on getting those to you early next week.

Be well,  
Mike Daly  
rpk GROUP

Michael Daly | Senior Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: [518-796-2209](tel:518-796-2209)

---

**From:** Debbie Storrs <[DASTORRS@uncg.edu](mailto:DASTORRS@uncg.edu)>  
**Sent:** Friday, August 11, 2023 2:07:18 PM  
**To:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>; Bob Shea <[r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)>  
**Cc:** Katie Hagan <[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)>  
**Subject:** Re: UNCG/rpk Weekly Project Update and Revised Market Analysis (for review)

Thanks Mike. I spoke briefly with Katie.

I'd also appreciate a FAQ document to accompany the revenue/expense data. Please send early next week for our review before we post.

Also, might we replace the red/green color of arrows and just have the arrows up or down?

Thanks much and have a great weekend,  
Debbie

Provost & Executive Vice Chancellor  
University of North Carolina Greensboro  
201 Mossman Building  
Greensboro, NC 27412  
[dastorrs@uncg.edu](mailto:dastorrs@uncg.edu)  
336.334.5494  
<https://provost.uncg.edu/>

---

**From:** Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)>  
**Sent:** Friday, August 11, 2023 10:25 AM

**To:** Debbie Storrs <dastorrs@uncg.edu>; Bob Shea <r\_shea@uncg.edu>  
**Cc:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** Re: UNCG/rpk Weekly Project Update and Revised Market Analysis (for review)

Hi Debbie and Bob,

Short update this week, so no formal attachment for review. For your awareness:

- rpk will be sharing a short narrative to provide additional context to the financial tables. This was requested by Academic Deans as they work to ensure their constituents can understand the approach and how the tables can be informative.
- rpk will be meeting with UNCG IR on 8/14 to review the approach to the financial tables. This is in anticipation that IR will receive some questions related to the tables.
- In recognition of the official transfer of the academic dashboard to UNCG IR and the completed ASR work, I'll be turning off the [general project feedback form](#) next Friday (8/18)

Please let me know if you have any questions.

Thanks again,  
Mike Daly  
rpk GROUP

---

**From:** Mike Daly  
**Sent:** Friday, August 4, 2023 11:31 AM  
**To:** Debbie Storrs <dastorrs@uncg.edu>; Bob Shea <r\_shea@uncg.edu>  
**Cc:** Katie Hagan <khagan@rpkgroup.com>  
**Subject:** UNCG/rpk Weekly Project Update and Revised Market Analysis (for review)

Hi Debbie and Bob,

Attached is the weekly project tracker for your reference. Note that I've labeled the project's overall status as 'on-track/complete' to reflect the finished ASR work and remaining engagements/meetings related to the dashboards.

Also attached is the revised Market Analysis narrative. I'd encourage your review and any needed discussions with us before sharing on the project's site.

Have a great weekend!

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)



626C Admiral Drive, Suite 511, Annapolis, MD 21401  
mdaly@rpkgroup.com | Cell: 518-796-2209

**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Project Update  
**Date:** Friday, May 12, 2023 12:15:29 PM  
**Attachments:** [Outlook-nfgrgq2w.png](#)  
[UNCG Weekly Project Update 2023.05.11.pdf](#)  
[MDO Competitor List Draft v2.xlsx](#)

---

Hi Debbie and Bob,

Two items are attached for your review and awareness.

1. Weekly project tracker
  - a. Of note:
    - i. Academic program data for graduate students (particularly new metrics for UNCG, retention, and time to degree) have been slowed as UNCG IR has been asked to fulfill unexpected but critical data needs for the institution. I'm confident we'll get these metrics over the next week.
    - ii. Planning workshops for department chairs has not progressed. I'll continue to reach out to Andrew Hamilton and Dave Teachout.
2. The list of institutions that we identified as being significantly present from National Clearinghouse Data related to accepted students who chose not to enroll at UNCG and students who transferred out of UNCG.
  - a. Please let me know if you'd like to include the bottom two (both private).
  - b. This list will be utilized for our labor and market competitor analysis.

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Senior Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
mdaly@rpkgroup.com | Cell: 518-796-2209



"In order to succeed, we must first believe that we can."

Nikos Kazantzakis

---

**From:** Bob Shea <[R\\_SHEA@uncg.edu](mailto:R_SHEA@uncg.edu)>

**Sent:** Thursday, May 11, 2023 9:50 PM

**To:** Kammy Jefferson <[KMWHITE7@uncg.edu](mailto:KMWHITE7@uncg.edu)>; [rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)  
<[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>

**Subject:** Re: Booking Time to Catch Up

3 works

Get [Outlook for iOS](#)

---

**From:** Kammy Jefferson <[KMWHITE7@uncg.edu](mailto:KMWHITE7@uncg.edu)>

**Sent:** Thursday, May 11, 2023 7:51:03 PM

**To:** Bob Shea <[R\\_SHEA@uncg.edu](mailto:R_SHEA@uncg.edu)>; [rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>

**Subject:** Re: Booking Time to Catch Up

Hi Rick,

Hope you are doing well. 1:00-1:30 will work on 5/15, if you need more than 30 minutes, we may be able to work out a call on 5/17 at 3:00.

Please let me know which works best.

Thanks!

Get [Outlook for Android](#)

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**From:** Bob Shea <[R\\_SHEA@uncg.edu](mailto:R_SHEA@uncg.edu)>

**Sent:** Thursday, May 11, 2023 6:43:33 PM

**To:** Kammy Jefferson <[KMWHITE7@uncg.edu](mailto:KMWHITE7@uncg.edu)>

**Subject:** Fwd: Booking Time to Catch Up

Pls coordinate as a priority.

Bob Shea

Begin forwarded message:

**From:** Rick Staisloff <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>

UNCG



# UNCG & rpk GROUP

## Status Report: May 11, 2023

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from mission to market

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# Project Overview: May 5 – May 11

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>Mike met with Provost’s Academic Portfolio Review Taskforce and shared resources from 5/2 town hall (5/10).</li> <li>Finalized list of institutions informing Labor and Market Competitor Analysis.</li> <li>Finalized academic structure informing dashboards and shared with UNCG IR.</li> <li>Katie reviewed draft findings from Chancellor’s Financial Sustainability Taskforce.</li> <li>Mike met with UNCG IR’s PowerBI team to discuss formal hand-off of dashboards (5/11).</li> </ul>	<ul style="list-style-type: none"> <li>Katie attending Chancellor’s Financial Sustainability Taskforce (5/12).</li> <li>Rick meeting with Chancellor Gilliam (5/15).</li> <li>Mike meeting with Data Stewards to review data decisions to date (5/15).</li> <li>UNCG/rpk Data Team meeting (5/18).</li> <li>Draft findings from Labor and Market Competitor Analysis.</li> <li>Draft direct net revenue analysis.</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>UNCG IR/ HR shared updated faculty data.</li> <li>UNCG IR share mapping of course subject codes to revenue allocations per UNC System model.</li> <li>UNCG IR reviewed approach to programs split across departments and are coordinating a new data flow.</li> </ul>	<ul style="list-style-type: none"> <li>Scheduling opportunities for academic data dashboards as part of Chairs’ workshops and trainings.</li> </ul>

Key					
	Complete	On Track	At Risk	Off Track	Not Started

# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	On Track	On Track	On Track														
Dashboard Development																On Track	On Track	On Track	On Track	On Track	On Track										
Dashboards Shared with Deans																							On Track	On Track	On Track						
Dashboards Shared with Chairs																								On Track	On Track	On Track					
Dashboards Shared with Taskforce																									On Track	On Track	On Track				
Faculty Workshops										Complete	Complete	On Track	On Track	On Track	On Track	On Track	On Track	At Risk	At Risk	At Risk		On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	



# Timeline – Administrative Services Review

Phase	January					February				March				April				May				June				July					
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						Complete	Complete	Complete	Complete																						
Stakeholder Interviews & Survey						Complete	Complete	Complete	Complete	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk	At Risk														
Final Report & Recommendations																				Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started

Note: rpk is providing support for the Chancellor’s Task Force on Financial Responsibility in place of what was originally scoped for the administrative services review. Katie is continuing to attend those meetings and engaging when asked (e.g., distributing and analyzing the stakeholder feedback survey). Stakeholder interviews and additional analysis and report drafting will be on hold until the Task Force work advances and rpk has a better idea of how to best add value.

Task Force will share final recommendations with the Chancellor on May 22, and from there the remaining work of rpk will be determined.

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Status Meeting (monthly)	Chancellor Gilliam Rick Staisloff	5/15, 12:30pm	-
Data Stewards Meeting	Mike and Data Stewards	5/15, 1:00pm	Sharing data decisions informing dashboards
UNCG/rpk Data Team meeting	Data Team members	5/18, 10:00am	
Project Leaders Meeting	Debbie, Bob, Katie and Mike	5/22, 8:30am	Review weekly project trackers

# Revised Timeline – Academic Data/Dashboards

Data	All Data Collected	Definitions and Methodology Confirmed	Data Validated	Beta Dashboard Launch and Feedback Period	Beta Dashboard Refined Based on Feedback
Academic Program List	3/24	4/18	4/27	6/5 – 6/30	7/3-7
Academic Structure	4/7	4/21	N/A		
Course Data	3/24	4/13	4/21		
Instructor Data	3/31	5/4	5/5		
Faculty Data	4/14	5/4	5/5		
Academic Program Data*	4/14	4/28	5/5		
Finance Data	3/24	5/19	5/26	TBD	TBD

\* UNCG IR received unanticipated requests for data in support of system and legislative conversations. Those requests have delayed the final development of two metrics related to graduate programs.

Key	Complete	On Track	At Risk	Off Track	Not Started

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# Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

Two Year or Four Year?	Row Labels	Sum of Count of Year 1: School Code/Branch of First Different X Institution Attended	state	city	public/private	highest degree offered	12-month full-time equivalent enrollment (2021)
Four Year	University of North Carolina at Greensboro	client	NORTH CAROLINA	Greensboro	Public	Doctor's degree - research/scholarship and professional practice	17,239
Four Year	UNIVERSITY OF NORTH CAROLINA - CHARLOTTE	980	NORTH CAROLINA	Charlotte	Public	Doctor's degree - research/scholarship and professional practice	27,006
Four Year	APPALACHIAN STATE UNIVERSITY	571	NORTH CAROLINA	Boone	Public	Doctor's degree - research/scholarship and professional practice	19,619
Four Year	NORTH CAROLINA STATE UNIVERSITY	564	NORTH CAROLINA	Raleigh	Public	Doctor's degree - research/scholarship and professional practice	31,731
Four Year	EAST CAROLINA UNIVERSITY	522	NORTH CAROLINA	Greenville	Public	Doctor's degree - research/scholarship and professional practice	25,329
Four Year	UNIVERSITY OF NORTH CAROLINA-CHAPEL HILL	420	NORTH CAROLINA	Chapel Hill	Public	Doctor's degree - research/scholarship and professional practice	28,963
Four Year	UNIVERSITY OF NORTH CAROLINA-WILMINGTON	261	NORTH CAROLINA	Wilmington	Public	Doctor's degree - research/scholarship and professional practice	16,133
Four Year	WESTERN CAROLINA UNIVERSITY	166	NORTH CAROLINA	Cullowhee	Public	Doctor's degree - research/scholarship and professional practice	10,913
Four Year	NORTH CAROLINA CENTRAL UNIVERSITY	123	NORTH CAROLINA	Durham	Public	Doctor's degree - research/scholarship and professional practice	7,223
Four Year	WINSTON SALEM STATE UNIVERSITY	92	NORTH CAROLINA	Winston-Salem	Public	Doctor's degree - professional practice	4,980
Four Year	FAYETTEVILLE STATE UNIVERSITY	84	NORTH CAROLINA	Fayetteville	Public	Doctor's degree - research/scholarship	5,857
Four Year	ELON UNIVERSITY	66	NORTH CAROLINA	Elon	Private not-for-profit	Doctor's degree - professional practice	7,014
Four Year	HIGH POINT UNIVERSITY	64	NORTH CAROLINA	High Point	Private not-for-profit	Doctor's degree - research/scholarship and professional practice	6,329

**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#); [Paul Forte](#); [Jennifer Leung](#)  
**Cc:** [Raven Moody](#)  
**Subject:** Net Revenue Analysis Description & Decision Point  
**Date:** Friday, May 12, 2023 12:31:14 PM  
**Attachments:** [UNCG Direct Net Revenue Methodology.pdf](#)

---

Hi Bob, Paul, and Jennifer,

Thanks very much for the time last week to discuss the net revenue analysis. Attached are a few slides that walk through the analysis methodology. There is a decision point with a recommendation on slide 9, so would appreciate your response on that by the end of next week if possible. Please let me know if you have any questions about that or anything else shared in the slides.

Have a great weekend,  
Katie

**rpk** GROUP  
from mission to market

Katie Hagan | Principal | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

khagan@rpkgroup.com | 757-589-0490





# UNC Greensboro

Direct Net Revenue Analysis

May 12, 2023

# Goals for Direct Net Revenue Analysis

- Transparency
  - Academic department revenues and expenses
  - High-level data across departments and schools over time
- Build shared understanding of:
  - Past resource usage and distribution
  - Levers under our control (both resource and cost drivers)
- Begin shared pursuit of good stewardship amid shifting financial landscape



# Connection to Academic Portfolio Review

Below is what the Task Force assembled by Provost Storrs to make recommendations about academic programs and departments is being asked to consider as it relates to financial & finance-adjacent (faculty, staff) data – bold items are of particular relevance for this analysis:

*Cost and Revenue of Delivery (estimated based on the factors below; all course, personnel, and finance data are tracked in institutional data systems at the department/school level—efforts to capture faculty effort and related costs and revenues at the program level would have to be done manually)*

- 1. Faculty FTE (total full-time and part-time faculty FTE) and faculty headcount by department/school*
- 2. SHRA and EHRA Non-faculty Staff FTE (total full-time and part-time staff FTE) and staff headcount by department/school*
- 3. Personnel spending for all faculty, staff, and graduate teaching/research assistants at the department/school level*
- 4. Non-personnel spending for the department/school*
- 5. Revenue for the department (tuition, differential tuition, fees, state appropriation)**
- 6. Credit hour production by full-time and part-time faculty at the department/school level*
- 7. Cost per credit hour by department/school**

# Developing the Direct Net Revenue Model

- Determine the ‘pot of money’
  - Which revenues and expenses should be included/excluded in the model?
- Determine what will be ‘direct’
  - Which revenues and expenses are specifically related to an academic department?
- Determine allocation methodologies
  - How will the dollars be distributed to the appropriate academic departments?

# What's Included & What's Not?

- Finance Data Source: ODS Data Warehouse, Cash Basis
- Years: FY2020, FY2021 & FY2022
- INCLUDED:
  - Unrestricted funds only. Restricted, Auxiliary, Loan, Endowment, Agency, and Plant funds are excluded.
  - Unrestricted revenues and expenses directly assigned to academic departments are included. All other unrestricted fund activity is excluded, which includes academic administration and institutional administration.
  - Tuition & fees, scholarships/waivers, and state appropriation although not directly assigned to academic departments are included and are allocated based on appropriate methodology.

# Expense Methodology

- All unrestricted fund expenses with a finance org identified as an academic department are included.
- Exceptions:
  - Fund 112073-DNP Prog Tuition Differential is assigned to org 12801-Dean's Office – NU, which is not an academic department. After discussion with dean, it was determined this should be included as a Nursing academic department expense, not a dean expense.
  - Expenses for the Joint School of Nanosci/Nanoeng includes org 13201-Dean's Office – NN and 13202-Nanoscience. Unlike other schools, faculty are assigned to the dean's office org as their home department in HR data as well as charged there in finance data. 13202-Nanoscience contains mostly operational expenses.

# Revenue Methodology: Net Tuition & Fees

- Direct net tuition & fee revenues (includes scholarships and waivers) not assigned to an academic department org will be distributed based on one of the following attributes:
  - **Level** – Allocated to academic departments based on portion of undergraduate or graduate student credit hours produced.
  - **All** – Allocated to all academic departments based on portion of total student credit hours produced.
- **Exceptions:**
  - Differential tuition revenue funds are not assigned to academic department orgs. These are mapped directly to the appropriate academic department org except for those assigned to the Bryan School. Per discussion with Bryan School dean, they centralize those expenditures for expenses not directly related to the instruction of those programs.

# Revenue Methodology: State Appropriation

- State appropriation will be allocated to academic departments using the current funding model logic (amounts allocated to units proportional to the funding per credit hour/academic discipline per the FY23 UNC System formula).
- See next slide for options for determining how much state revenue should flow through the model.

# Scenarios for State Allocation

Options	Descriptions	Amount of State Funding Allocated in rpk Model
Option 1: Most Conservative	Allocate such that the percentage of unrestricted revenue (T&F + State) equals the percentage of unrestricted expense being consumed via direct departmental expenses compared to UNCG's total expenses. For the years of analysis, the direct dept. expense ranges from 37-38% of UNCG total unrestricted expenses.	2020: \$45.4M 2021: \$42.2M 2022: \$57.4M
Option 2: Middle	Award all T&F revenue to academic departments, and then give them the portion of the state revenue proportional to the total direct departmental expenditures. For the years of analysis, the direct dept. expense ranges from 37-38% of UNCG total unrestricted expenses. This differs from the above in that the state aid is not reduced to reflect the fact that all T&F revenue is being awarded to the departments.	2020: \$68.4M 2021: \$66.5M 2022: \$69.9M
Option 3: Least Conservative	Expenses being consumed directly by departments account for 70% of Academic Affairs general fund expenditures. Use that percentage and apply it to what Academic Affairs received via the state budget allocation in the year of analysis (for all years, the total budget from the state is ~\$200M and AA is awarded ~73% of that).	2020: \$109.3M 2021: \$104.2M 2022: \$102.2M

***rpk recommends UNCG uses Option 1 or 2. Both options result in the total direct expenses and total direct revenues breaking even or generating a surplus annually, but not every department will break even or generate a surplus (there will be clear areas of loss that are being subsidized by areas generating a profit).***



# Thank you

Katie Hagan, Principal  
Raven Moody, Sr. Analyst

**From:** [Paul Forte](#)  
**To:** [Katie Hagan](#); [Bob Shea](#); [Jennifer Leung](#)  
**Cc:** [Raven Moody](#)  
**Subject:** Re: Net Revenue Analysis Description & Decision Point  
**Date:** Friday, May 12, 2023 1:15:05 PM

---

I like option 1

---

**From:** Katie Hagan <khagan@rpkgroup.com>  
**Sent:** Friday, May 12, 2023 12:30 PM  
**To:** Bob Shea <r\_shea@uncg.edu>; Paul Forte <pdforte@uncg.edu>; Jennifer Leung <jwleung@uncg.edu>  
**Cc:** Raven Moody <rmoody@rpkgroup.com>  
**Subject:** Net Revenue Analysis Description & Decision Point

Hi Bob, Paul, and Jennifer,

Thanks very much for the time last week to discuss the net revenue analysis. Attached are a few slides that walk through the analysis methodology. There is a decision point with a recommendation on slide 9, so would appreciate your response on that by the end of next week if possible. Please let me know if you have any questions about that or anything else shared in the slides.

Have a great weekend,  
Katie

**rpk** GROUP  
from mission to market

Katie Hagan | Principal | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
khagan@rpkgroup.com | 757-589-0490

**From:** [Bob Shea](#)  
**To:** [Debbie Storrs](#); [Katie Hagan](#); [Mike Daly](#)  
**Subject:** UNCG Data Issue to Discuss/Resolve  
**Date:** Tuesday, May 16, 2023 5:28:00 PM  
**Attachments:** [image002.png](#)

---

Katie and Mike,

We met with Karen Blackwell and Johnny Lail [UNCG data leaders] for a regularly scheduled meeting today and an issue came up that we'd like to discuss and resolve at our next check in meeting. Debbie and I think it is appropriate for Karen and Johnny to attend and discuss the technical details. We also wanted you to have the opportunity to discuss with Raven prior to the meeting and have her attend as well.

Paraphrasing Johnny here. The issue is the source [Datamart or Banner] and the aggregation of the data into the dashboard. Johnny and Karen both opined that this approach would leave us in the position of not easily being self sufficient with this data/dashboard post rpk engagement. There seems to be a difference of opinion we need to iron out.

Debbie, I'm hoping I captured the substance of the issue here in this email.

We're looking forward to discussing and resolving. Thanks in advance.

**Bob Shea**  
**Vice Chancellor for Finance and Administration**  
**University of North Carolina Greensboro**  
**Mossman Building 254**  
[r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)  
336-334-5200



**From:** [Katie Hagan](#)  
**To:** [Bob Shea](#); [Debbie Storrs](#); [Mike Daly](#)  
**Subject:** Re: UNCG Data Issue to Discuss/Resolve  
**Date:** Tuesday, May 16, 2023 7:50:44 PM  
**Attachments:** [image002.png](#)

---

Hi Bob and Debbie,

Thanks for the flag - happy to discuss. Just to clarify, was there a concern about the dashboards and replicability, or the financial analysis? We've been in touch with Johnny and Karen throughout on the dashboard, so this is a surprise, but we can definitely talk it through and see what options we have to resolve. On the financial analysis, that information will not be in the dashboards so replication of that will be different, but not something we feel will be challenging to replicate. We've documented all workflow across the analyses so are in a good position to execute that knowledge transfer. Mike and Johnny met about that specifically last week.

Given the time sensitivity of getting to a resolution on this so that we can keep the work moving forward, would you like to meet this week? We can be available in the following windows:

5/17: 12-12:45pm, 3:30-5pm

5/18: 9-10am, 11am-12:30pm, 1-2pm, 3:30-5pm

5/19: 3:30-4:30pm

Best,  
Katie

---

**From:** Bob Shea <R\_SHEA@uncg.edu>  
**Sent:** Tuesday, May 16, 2023 5:28 PM  
**To:** Debbie Storrs <DASTORRS@uncg.edu>; Katie Hagan <khagan@rpkgroup.com>; Mike Daly <mdaly@rpkgroup.com>  
**Subject:** UNCG Data Issue to Discuss/Resolve

Katie and Mike,

We met with Karen Blackwell and Johnny Lail [UNCG data leaders] for a regularly scheduled meeting today and an issue came up that we'd like to discuss and resolve at our next check in meeting. Debbie and I think it is appropriate for Karen and Johnny to attend and discuss the technical details. We also wanted you to have the opportunity to discuss with Raven

prior to the meeting and have her attend as well.

Paraphrasing Johnny here. The issue is the source [Datamart or Banner] and the aggregation of the data into the dashboard. Johnny and Karen both opined that this approach would leave us in the position of not easily being self sufficient with this data/dashboard post rpk engagement. There seems to be a difference of opinion we need to iron out.

Debbie, I'm hoping I captured the substance of the issue here in this email.

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**Bob Shea**  
**Vice Chancellor for Finance and Administration**  
**University of North Carolina Greensboro**  
**Mossman Building 254**  
[r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)  
**336-334-5200**



**From:** [Debbie Storrs](#)  
**To:** [Katie Hagan](#); [Bob Shea](#); [Mike Daly](#); [Gladys Kammetler](#); [Kammy Jefferson](#)  
**Subject:** Re: UNCG Data Issue to Discuss/Resolve  
**Date:** Wednesday, May 17, 2023 7:53:03 AM  
**Attachments:** [image002.png](#)

---

Good morning,  
The concern is with the replicability of the dashboards.

I'll see if Gladys and Kammy can coordinate a meeting this week.

Debbie

---

**From:** Katie Hagan <khagan@rpkgroup.com>  
**Sent:** Tuesday, May 16, 2023 7:50 PM  
**To:** Bob Shea <R\_SHEA@uncg.edu>; Debbie Storrs <DASTORRS@uncg.edu>; Mike Daly <mdaly@rpkgroup.com>  
**Subject:** Re: UNCG Data Issue to Discuss/Resolve

Hi Bob and Debbie,

Thanks for the flag - happy to discuss. Just to clarify, was there a concern about the dashboards and replicability, or the financial analysis? We've been in touch with Johnny and Karen throughout on the dashboard, so this is a surprise, but we can definitely talk it through and see what options we have to resolve. On the financial analysis, that information will not be in the dashboards so replication of that will be different, but not something we feel will be challenging to replicate. We've documented all workflow across the analyses so are in a good position to execute that knowledge transfer. Mike and Johnny met about that specifically last week.

Given the time sensitivity of getting to a resolution on this so that we can keep the work moving forward, would you like to meet this week? We can be available in the following windows:

5/17: 12-12:45pm, 3:30-5pm  
5/18: 9-10am, 11am-12:30pm, 1-2pm, 3:30-5pm  
5/19: 3:30-4:30pm

Best,  
Katie

---

**From:** Bob Shea <R\_SHEA@uncg.edu>



**Sent:** Tuesday, May 16, 2023 5:28 PM

**To:** Debbie Storrs <DASTORRS@uncg.edu>; Katie Hagan <khagan@rpkgroup.com>; Mike Daly <mdaly@rpkgroup.com>

**Subject:** UNCG Data Issue to Discuss/Resolve

Katie and Mike,

We met with Karen Blackwell and Johnny Lail [UNCG data leaders] for a regularly scheduled meeting today and an issue came up that we'd like to discuss and resolve at our next check in meeting. Debbie and I think it is appropriate for Karen and Johnny to attend and discuss the technical details. We also wanted you to have the opportunity to discuss with Raven prior to the meeting and have her attend as well.

Paraphrasing Johnny here. The issue is the source [Datamart or Banner] and the aggregation of the data into the dashboard. Johnny and Karen both opined that this approach would leave us in the position of not easily being self sufficient with this data/dashboard post rpk engagement. There seems to be a difference of opinion we need to iron out.

Debbie, I'm hoping I captured the substance of the issue here in this email.

We're looking forward to discussing and resolving. Thanks in advance.

**Bob Shea**  
**Vice Chancellor for Finance and Administration**  
**University of North Carolina Greensboro**  
**Mossman Building 254**  
[r.shea@uncg.edu](mailto:r.shea@uncg.edu)  
336-334-5200





**From:** [Rick Staisloff](#)  
**To:** [Bob Shea](#)  
**Subject:** Catch Up  
**Date:** Wednesday, May 17, 2023 4:03:04 PM  
**Attachments:** [image001.png](#)

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Sorry we missed each other today. I reached out to Kammy and we'll get something rescheduled.

Rick

**rp**k GROUP  
from mission to market

Richard Staisloff | Senior Partner | [rp](#)k GROUP  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

**From:** [Rick Staisloff](#)  
**To:** [Kammy Jefferson](#)  
**Cc:** [Bob Shea](#)  
**Subject:** RE: Booking Time to Catch Up  
**Date:** Wednesday, May 17, 2023 7:13:21 PM  
**Attachments:** [image001.png](#)

---

I can do that. I will need to be a call, however. I can call him.

Thanks.



Richard Staisloff | Senior Partner | [rpK GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

---

**From:** Kammy Jefferson <KMWHITE7@uncg.edu>  
**Sent:** Wednesday, May 17, 2023 4:13 PM  
**To:** Rick Staisloff <rstaisloff@rpkgroup.com>  
**Cc:** Bob Shea <R\_SHEA@uncg.edu>  
**Subject:** Re: Booking Time to Catch Up

Hey Rick,

Sorry about that, he was in Raleigh lobbying, he may have gotten tied up.

He has 5/25 2:00-3:00 would that work? Next week is full of Board meetings and Board of Governors meetings.

Let me know if this will work for you and I will calendar another call.

Thanks.

Get [Outlook for Android](#)

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**From:** Rick Staisloff <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>  
**Sent:** Wednesday, May 17, 2023 3:21:37 PM  
**To:** Kammy Jefferson <[KMWHITE7@uncg.edu](mailto:KMWHITE7@uncg.edu)>  
**Subject:** RE: Booking Time to Catch Up

Kammy,

I wasn't able to connect with Bob at 3:00. I'm sure he just got pulled into something. Let me know

what some other windows might look like next week.

Regards,

Rick

**rpk** GROUP  
from mission to market

Richard Staisloff | Senior Partner | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

---

**From:** Rick Staisloff  
**Sent:** Friday, May 12, 2023 10:16 AM  
**To:** Kammy Jefferson <[KMWHITE7@uncg.edu](mailto:KMWHITE7@uncg.edu)>  
**Subject:** RE: Booking Time to Catch Up

Same to you!

**rpk** GROUP  
from mission to market

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626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

---

**From:** Kammy Jefferson <[KMWHITE7@uncg.edu](mailto:KMWHITE7@uncg.edu)>  
**Sent:** Friday, May 12, 2023 8:27 AM  
**To:** Rick Staisloff <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>  
**Cc:** Bob Shea <[R\\_SHEA@uncg.edu](mailto:R_SHEA@uncg.edu)>  
**Subject:** Re: Booking Time to Catch Up

Happy to assist.

Hope you have a great weekend!

Best regards,

Kammy Jefferson  
Assistant to Bob Shea, VC for Finance and Administration

Executive Assistant to Paul Forte, AVC for Finance

1202 Spring Garden Street  
254 Mossman  
Greensboro, NC 27402  
Phone: 336-334-4053  
email: [kmwhite7@uncg.edu](mailto:kmwhite7@uncg.edu)



"In order to succeed, we must first believe that we can."

Nikos Kazantzakis

---

**From:** Rick Staisloff <[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com)>

**Sent:** Friday, May 12, 2023 8:18 AM

**To:** Kammy Jefferson <[KMWHITE7@uncg.edu](mailto:KMWHITE7@uncg.edu)>

**Cc:** Bob Shea <[R\\_SHEA@uncg.edu](mailto:R_SHEA@uncg.edu)>

**Subject:** Re: Booking Time to Catch Up

That works. Thanks for getting this set up.

Regards,

Rick

On May 12, 2023 8:13 AM, Kammy Jefferson <[KMWHITE7@uncg.edu](mailto:KMWHITE7@uncg.edu)> wrote:

Hi Rick,

I will send a calendar invite for a call on 5/17 at 3:00 pm.

Let me know if I can assist further.

Best regards,

Kammy Jefferson

Assistant to Bob Shea, VC for Finance and Administration

Executive Assistant to Paul Forte, AVC for Finance

1202 Spring Garden Street  
254 Mossman  
Greensboro, NC 27402  
Phone: 336-334-4053  
email: [kmwhite7@uncg.edu](mailto:kmwhite7@uncg.edu)

**Date:** May 11, 2023 at 5:00:33 PM EDT

**To:** Bob Shea <[r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)>

**Subject: Booking Time to Catch Up**

Wanted to get some time on the books next week to catch up. Let me know if any of these windows work:

5/15 – 1

5/17 – 3

5/19 – 11:30

Rick

**rpk** GROUP  
from mission to market

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626C Admiral Drive, Suite 511, Annapolis, MD 21401

[rstaisloff@rpkgroup.com](mailto:rstaisloff@rpkgroup.com) | Cell: 410-591-9018

**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** UNCG/rpk Weekly Project Update  
**Date:** Thursday, February 23, 2023 4:17:13 PM  
**Attachments:** [Outlook-vush24in.png](#)  
[UNCG Weekly Project Update 2023.02.23.pdf](#)

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Hello Debbie and Bob,

Attached is the weekly project update tracker for your review. Please let me know if you have any questions.

Debbie, we would like to put this link (<https://www.dropbox.com/s/21wd4fdwuskrx5v/UNCG%20rpk%20Project%20FAQs.pdf?dl=0>) on the project's website. We'll update this document throughout the project as questions arise. Please let me know if you need additional information to facilitate this request.

Finally, Katie and I are looking forward to our project leader check-in meeting on Monday. We'll follow our standard agenda but if there are additional items, please bring those forward for discussion.

- Feedback on projects and engagements
- Academic Data/Dashboards
- Administrative Services Review
- Project Communication
- Next Steps

Thanks again,  
Mike Daly

**rpk** GROUP  
from mission to market

Michael Daly | Associate | [rpk GROUP](#)

626C Admiral Drive, Suite 511, Annapolis, MD 21401

mdaly@rpkgroup.com | Cell: 518-796-2209

UNCG



# UNCG & rpk GROUP

## Status Report: February 23, 2023

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# Project Overview: February 16 - February 23

Overall Status	Project Status Overview & Key Items for Attention	
On Track		
Owner(s)	Accomplishments	Upcoming Activities
rpk GROUP	<ul style="list-style-type: none"> <li>• Katie visited UNCG on 2/17 to review project progress with Debbie and Bob</li> <li>• Mike met with Andrew Hamilton on 2/21 to initiate conversation regarding integrating rpk’s work with on-going training for department chairs</li> <li>• Mike met with Associate Deans on 2/23</li> <li>• rpk facilitated first UNCG/rpk Data Team meeting on 2/23</li> </ul>	<ul style="list-style-type: none"> <li>• Mike meeting with Graduate Council on 2/24</li> <li>• Katie meeting with Academic Council on 3/1</li> <li>• Sharing Frequently Asked Questions (FAQ) link for posting on project site</li> </ul>
UNCG	<ul style="list-style-type: none"> <li>• Launched survey in support of Administrative Services Review</li> </ul>	<ul style="list-style-type: none"> <li>• UNCG IR sharing initial sample data for course, instructor, and academic programs by 3/3</li> <li>• Posting FAQ link on project site</li> </ul>

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Academic Data/Dashboards

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track																
Dashboard 1: TBD												On Track	On Track	On Track	On Track	On Track	On Track														
Dashboard 2: TBD																On Track	On Track	On Track	On Track	On Track	On Track										
Faculty Workshops										On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Timeline – Administrative Services Review

Phase	January					February				March				April				May					June				July				
	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Kick-off and Data Discovery			Complete	Complete	Complete	Complete																									
Data Collection & Verification						On Track	On Track	On Track	On Track																						
Stakeholder Interviews & Survey						On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track																	
Final Report & Recommendations																On Track	On Track	On Track	On Track	On Track	On Track										

Key	Complete	On Track	At Risk	Off Track	Not Started
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# Key Upcoming Meetings

Title	Participants	Day and Time	Status / Next Steps
Project Status Meeting (monthly)	Chancellor Gilliam Rick Staisloff	3/21; 930am, 4/18; 930am, and 5/15; 12:30pm	Scheduling remaining months
Project Leaders Meeting (bi-weekly)	Debbie, Bob, Katie, and Mike	2/27; 10am	Review agenda and project tracker
Graduate Council	Mike and Graduate Council	2/24; 11am	-
Academic Council	Mike and Katie	3/1; 9am	-

# Data Collection Status

Status	File/Description	Notes
On track	Course data	UNCG sharing initial sample course, instructor and academic program data files with rpk
On track	Academic program list	
On track	Academic program data	
On track	Instructor data	
On track	Financial Data	Met with financial data leads to discuss collection
Ontrack	Administrative Services Review	Organizational charts and supporting documents shared

Key	Complete	On Track	At Risk	Off Track	Not Started

Thank you

Katie Hagan

[khagan@rpkgroup.com](mailto:khagan@rpkgroup.com)

Mike Daly

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)

**From:** [Bob Shea](#)  
**To:** [Debbie Storrs](#)  
**Cc:** [Katie Hagan](#); [Mike Daly](#)  
**Subject:** Re: UNCG/rpk Weekly Project Update  
**Date:** Thursday, February 23, 2023 5:59:50 PM  
**Attachments:** [Outlook-yush24in.png](#)

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Debbie I like your edit

On Thu, Feb 23, 2023 at 5:10 PM Debbie Storrs <[dastorrs@uncg.edu](mailto:dastorrs@uncg.edu)> wrote:

Mike,

Sure, I'll post but would like to request a modified answer to this question. If you are in agreement, can you correct before we post the link?

Thanks,

Debbie

Is this project focused on the elimination of programs? No, program elimination is not a focus of this project. The project will provide a dashboard to allow stakeholders to understand the entire academic portfolio, including student success across programs. Any decisions regarding the academic portfolio or offerings will follow UNCG's established governance procedures.

My suggestion: No, program elimination is not the focus of this project. The project will provide dashboard data to allow stakeholders to understand the entire academic portfolio, including student success across programs, that can inform decisions. Provost Storrs will work with faculty, chairs, program heads, and demands to develop a program review process that may lead to changes in the academic portfolio.

On Thu, Feb 23, 2023 at 4:17 PM Mike Daly <[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com)> wrote:

Hello Debbie and Bob,

Attached is the weekly project update tracker for your review. Please let me know if you have any questions.

Debbie, we would like to put this link

(<https://www.dropbox.com/s/21wd4fdwuskrx5v/UNCG%20rpk%20Project%20FAQs.pdf?dl=0>)

on the project's website. We'll update this document throughout the project as questions arise.

Please let me know if you need additional information to facilitate this request.

Finally, Katie and I are looking forward to our project leader check-in meeting on Monday. We'll follow our standard agenda but if there are additional items, please bring those forward for discussion.

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Thanks again,  
Mike Daly



# rpk GROUP

from mission to market

Michael Daly | Associate | [rpk GROUP](#)

[626C Admiral Drive, Suite 511, Annapolis, MD 21401](#)

[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

--

Thanks,

**Bob Shea**

Vice Chancellor for Finance and Administration

**University of North Carolina Greensboro**

Phone: 336-334-5200 Email: [r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)



**From:** [Mike Daly](#)  
**To:** [Debbie Storrs](#); [Bob Shea](#)  
**Cc:** [Katie Hagan](#)  
**Subject:** Re: UNCG/rpk Weekly Project Update  
**Date:** Thursday, February 23, 2023 7:31:29 PM  
**Attachments:** [Outlook-yush24in.png](#)  
[image.png](#)

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Thanks, Debbie. I will make the changes you suggested. The link will remain the same.

-Mike Daly

Michael Daly | Associate | [rpk GROUP](#)  
626C Admiral Drive, Suite 511, Annapolis, MD 21401  
[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: [518-796-2209](tel:518-796-2209)

---

**From:** Debbie Storrs <dastorrs@uncg.edu>  
**Sent:** Thursday, February 23, 2023 7:26:45 PM  
**To:** Bob Shea <r\_shea@uncg.edu>  
**Cc:** Katie Hagan <khagan@rpkgroup.com>; Mike Daly <mdaly@rpkgroup.com>  
**Subject:** Re: UNCG/rpk Weekly Project Update

Oops, saw error. Should read:

h faculty, chairs, program heads, and deans

On Thu, Feb 23, 2023 at 6:00 PM Bob Shea <[r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)> wrote:  
Debbie I like your edit

On Thu, Feb 23, 2023 at 5:10 PM Debbie Storrs <[dastorrs@uncg.edu](mailto:dastorrs@uncg.edu)> wrote:

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(<https://www.dropbox.com/s/21wd4fdwuskrx5v/UNCG%20rpk%20Project%20FAQs.pdf?dl=0>)

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- Administrative Services Review
- Project Communication
- Next Steps

Thanks again,  
Mike Daly

**rpk GROUP**  
from mission to market

Michael Daly | Associate | [rpk GROUP](#)

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[mdaly@rpkgroup.com](mailto:mdaly@rpkgroup.com) | Cell: 518-796-2209

--

Thanks,

**Bob Shea**

Vice Chancellor for Finance and Administration

**University of North Carolina Greensboro**

Phone: 336-334-5200 Email: [r\\_shea@uncg.edu](mailto:r_shea@uncg.edu)



--

**Debbie Storrs**

UNC Greensboro

Provost & Executive Vice Chancellor

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