



THE UNIVERSITY  
of NORTH CAROLINA  
at CHAPEL HILL

## ATTACHMENT A

**CAROL L. FOLT**  
*Chancellor*

103 SOUTH BUILDING  
CAMPUS BOX 9100  
CHAPEL HILL, NC 27599

T 919.962.1365  
F 919.962.1647  
carol.folt@unc.edu

TO: Members of the Board of Trustees

FROM: Carol L. Folt

RE: Personnel Mail Ballot

DATE: August 4, 2016

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You have authorized me to poll you by mail ballot concerning personnel matters which require the immediate attention of the Board.

I am seeking approval to appoint Dr. Gary Bowen as Dean of the School of Social Work. The appointment is effective September 1, 2016. Attached is the formal offer letter and a copy of Dr. Bowen's CV.

Please complete the attached mail ballot and return to TJ Scott at your earliest convenience.

August 4, 2016

Gary Bowen  
117 Lions Gate Drive  
Cary, NC 27518

Dear Dr. Bowen:

I am pleased to write this letter to you to offer you the position of Dean of the School of Social Work at The University of North Carolina at Chapel Hill effective September 1, 2016 on the terms and conditions outlined herein and subject to the approval of the Board of Trustees of The University of North Carolina at Chapel Hill.

Your initial twelve-month annual salary will be \$275,000. Your salary will be reviewed at least annually, subject to the compensation policies of the Board of Trustees and Board of Governors. Your appointed position will report to the Chancellor with administrative assignment to the Executive Vice Chancellor and Provost. This will be an "at will" appointment of indeterminate length with a review every five years and subject to continuation or discontinuation at the discretion of the Chancellor.

This appointment is subject to the "Employment Policies for EHRA Non-Faculty Tier 1 Senior Academic and Administrative Officer Employees of The University of North Carolina at Chapel Hill" as originally adopted and as they may be periodically revised from time to time. According to the Policies, you will be entitled to 26 days of annual leave per year. Sick leave is earned at the rate of 1 day per month or 12 days per year. On December 31 of each year, any annual leave accrued in excess of 30 days will automatically be converted to sick leave. There is no limit to the amount of sick leave you may accrue.

At the end of appointment, EHRA employees eligible for vacation and bonus leave payout or the transfer of leave, if appropriate. The full Policies are available for reference online at [http://hr.sites.unc.edu/files/1012/11/Employment-Policies-for-EPA-Non-Faculty\\_Tier-1-SAAO.pdf](http://hr.sites.unc.edu/files/1012/11/Employment-Policies-for-EPA-Non-Faculty_Tier-1-SAAO.pdf).

You will be required to attend an employee orientation within 30 days of your hire. Carolyn Adams, Human Resources Director, will be able to assist you with the registration. Information regarding Employee Benefits is available for reference online at <http://hr.unc.edu/benefits/>.

You will have a reserved parking space subject to the annual costs for parking on campus. You will receive two season tickets to the men's football and men's basketball games. The basketball tickets will be in the Ring Section where the other deans are positioned. Please note that the tickets are considered taxable income.

Appointment is conditional on satisfactory completion of the University's required background check process. In the event this process has not been fully completed at the time your appointment begins, this appointment may be rescinded if any remaining checks disclose information that, in the University's judgment, are sufficient to bar continued appointment. Before a final decision is made to rescind any appointment, the appointee will receive a copy of the information used in reaching this decision and will have an opportunity to provide clarifying information on proposed corrections to the background check results.

If you agree to these terms, please sign and return this letter and the enclosed AP-2 form at your earliest convenience.

Sincerely,

James W. Dean, Jr.  
Executive Vice Chancellor and Provost

Enclosures:      Employment Policies for EHRA Non-Faculty Tier 1 SAAO Employees Form AP2

Acknowledgement and Acceptance by Appointee:

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Name

Date

cc: Academic Personnel Office  
EHRA Non-Faculty Personnel Office  
Ms. Carolyn Adams, Human Resources Director, UNC Chapel Hill School of Social Work

**GARY L. BOWEN, Ph.D., ACSW**  
**KENAN DISTINGUISHED PROFESSOR**  
**SCHOOL OF SOCIAL WORK**  
**THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL**

Dr. Bowen is Kenan Distinguished Professor in the School of Social Work (SSW) at The University of North Carolina at Chapel Hill (UNC-CH). Dr. Bowen co-directed the development of the Ph.D. Program in Social Work at UNC-CH (1988-1991), and served as co-director of the program in its first three years of operation (1991-1994). He directed the program of study for the first doctoral graduate of the SSW (1997). Dr. Bowen served as an elected member on the Committee on Appointments, Promotions, and Tenure: Professional Schools other than Medicine from 2009-2012, and he co-led the comprehensive revision of the Tenure and Promotion Policy in the SSW in 2012-13 and the SSW Bylaws in 2013-14. Dr. Bowen chaired the search committees that resulted in the appointments of Dr. Jack Richman, Dr. Mark Fraser, and Dr. Matthew Howard—all notable leaders and contributors in the SSW.

Dr. Bowen currently co-directs the School Success Profile (SSP) project in the SSW at UNC-CH with Dr. Jack Richman and Dr. Natasha Bowen (Ohio State University, since 2015). The two student-level assessments that have emerged from this work, the School Success Profile and the Elementary School Success Profile, have been administered to nearly 100,000 students in nearly 2,000 schools and youth-serving agencies. These assessments address students' beliefs about their social environment—neighborhoods, schools, friends, and families—and about their own physical and psychological health and school performance. The SSP or parts of the SSP have been translated into Spanish, Hebrew, Lithuanian, Romanian, and Portuguese. Working with one of his doctoral students, Joelle Power, Dr. Bowen developed the School Success Profile Learning Organization (SSP-LO) to assess schools' organizational readiness for innovation. The SSP-LO has been translated into Hebrew and Portuguese. The development, psychometric testing, and use of these assessment tools have been supported by a series of grants from the BellSouth Foundation (1992–1997), from the John S. and James L. Knight Foundation (1995–2006), from the William T. Grant Foundation (2003–2006), and from the National Institute on Drug Abuse (2005-2010), and from contracts with school systems and youth serving organizations across the United States (1992-present). SSP-related publications have appeared in *Family Relations*, *Journal of Family Issues*, *Child and Adolescent Social Work Journal*, *Children & Schools*, *Evaluation and Program Planning*, *Educational and Psychological Measurement*, *Journal of Adolescent Research*, *Journal of Early Adolescence*, *Journal of Social Work*, *Research on Social Work Practice*, *Social Work*, and *Social Work Research*.

Dr. Bowen has extensive experience working with all branches of the military services, and he has visited installations worldwide during the past 30 years in the context of consulting with military policymakers, researchers, and practitioners across a range of mental health and social service issues. His sponsors have included the Armed Forces YMCA, the Office of the Secretary of Defense, the Defense Manpower and Data Center, Youth Activities in the Office of Family Policy, the Office of Naval Research, the U.S. Army Community and Family Support Center, the U.S. Army Research Institute for the Behavioral and Social Sciences, the Family Life Development Center at Cornell University, the Military Family Research Institute at Marywood College, the Air Force Office of the Chief of Chaplains, the Air Force Office of Family Matters, the U.S. Air Force Family Advocacy Division, the U.S. Marine Corps Community Services, OSD Office of Community Practice and Family Support, and the AF Resilience Office. Working with Dr. James Martin, Dr. Gary Bowen developed the U.S. Air Force Support and Resiliency Profile (SRI), the U.S. Marine Corps Family Readiness Assessment Tool (FRAT), the U.S. Marine Corps Fitness Tool (MCFIT), and the DoD Individual and Community Readiness Inventory (ICRI).

In 1999, Dr. Bowen conducted a landmark study of community life in the Air Force, *Communities in Blue for the 21<sup>st</sup> Century*, which was anchored in his earlier work with the U.S. Army Research Institute. The results of this study informed the reorganization of prevention services in the U.S. Air Force. Integrated Delivery Teams at all Air Force bases worldwide received training in community capacity building, which was based on a model developed by Dr. Bowen and colleagues, and Dr. Bowen's template for community action planning is used to inform the work of Community Action Information Boards (CAIBs) across the AF (AF Instruction 90-501). Dr. Bowen is also co-author with Dr. Dennis Orthner of the *Families-In-Blue* series (1979-1981) that led to the development of Family Support Centers in the U.S. Air Force.

Dr. Bowen has published extensively on the nature of the work and family interface in the U.S. Military, including the now classic volume, *The Organization Family: Work and Family Linkages in the U.S. Military* (Praeger Press), which he co-edited in 1989 with Dr. Dennis Orthner. Dr. Bowen is co-editor of a new book that was released in 2015 by Routledge Press in New York: *Military Families and War in the 21<sup>st</sup> century: Comparative Perspectives*. His military-related publications have appeared in the *Journal of Marriage and Family*; *Family Relations*; *Youth and Society*; *Armed Forces & Society*; *Evaluation and Program Planning*; *Journal of Community Practice*; *Journal of Aggression, Maltreatment, and Trauma*; *Military Behavioral Health*, and the *American Journal of Community Psychology*. He has been a featured guest on National Public Radio (*The Tavis Smiley Show*) discussing the *Iraq War*, *One year later: The view from soldiers' families*. Dr. Bowen served as a member of the Council on Social Work Education's (CSWE) Veteran's Affairs Joint Task Force.

Dr. Bowen is Past President of the National Council on Family Relations, past president of the Family Council of North Carolina, and past membership vice president of the National Council on Family Relations. His honors include the National Graduate Student of the Year Award in 1981 from the National Council of Family Relations, an Alumni Pacesetter Award in 1998 from the University of North Carolina at Greensboro's School of Environmental Sciences "for actively making a difference in the lives of others and the world around them," a Distinguished Alumni Award in 2013 from the University of North Carolina at Greensboro's School of Health and Human Sciences, and a Distinguished Alumni Award in 2016 from the University of North Carolina at Chapel Hill's School of Social Work. In 2001, he was identified as a National Council on Family Relations Fellow for his enduring contributions to the field of family studies through a career of teaching, scholarship, outreach, professional service and leadership; in 1983, he was identified as an Armed Forces and Society Fellow. In 2013, he was identified as an inaugural Fellow, Society for Social Work and Research (SSWR). Dr. Bowen received the "Most Innovative Professor Award" in 2002 from the Social Work Student Organization at the UNC-CH; in the 2004-2005, 2005-2006, 2006-2007, 2008-2009, 2010-2011, and 2015-2016 academic years, he received the Dean's Recognition of Teaching Excellence, which recognizes faculty members whose student teaching evaluation scores consistently remain among the highest of the faculty. In 2016, Dr. Bowen received the Excellence in Doctoral Mentoring Award, which is based on nominations from fellow faculty members and students in the SSW. Dr. Bowen serves as a member of the distinguished Research Council for America's Promise, and he is consultant on a four-year, \$7.6 M consortium project funded by the Department of Defense Education Activity (DoDEA) to the University of Southern California: *Building Capacity to Create Highly Supportive Military-Connected School Districts*.

**OFFICE ADDRESS:** School of Social Work  
University of North Carolina at Chapel Hill  
325 Pittsboro Street  
Chapel Hill, NC 27599-3550

**HOME ADDRESS:** 117 Lions Gate Drive  
Cary, NC 27518

**PHONE:** (919) 962-6542 (Office); (919) 377-2999 (Home)

**E-MAIL:** glbowen@email.unc.edu

**BIRTHDATE:** March 5, 1953

**AREAS OF EXPERTISE:** Community Capacity Building; School Success; Work, Family, and Community Linkages; Military Families; Family Stress, Coping, and Social Support; Adolescent Resiliency; Evaluation Research

**ORGANIZING THEME OF SCHOLARLY WORK:** Ways in which elements of social structure frame and influence individual and collective orientations and behavioral choices.

**EDUCATION:**

<b>Institution and Location</b>	<b>Degree</b>	<b>Major</b>	<b>Date Conferred</b>
University of North Carolina at Greensboro School of Human Environmental Sciences	Ph.D.	Family Relations/Child Development Sociology (Minor)	1981 (National Award) (4.0/4.0 GPA)
University of North Carolina at Chapel Hill School of Social Work	MSW	Mental Health	1976 (NIMH Fellowship)
University of North Carolina at Greensboro	B.S./BSW	Sociology/Social Work	1975 (cum laude)
East Carolina University		Sociology	1971-72

**SOCIAL WORK FIELD EDUCATION:**

<b>Agency and Location</b>	<b>Division</b>	<b>Dates</b>
North Carolina Memorial Hospital Chapel Hill, NC	Child Psychiatry Outpatient Division	May 1976 – June 1976 (FT)
North Carolina Memorial Hospital Chapel Hill, NC	Child Psychiatry Outpatient Division	August 1975 – May 1976
Guilford County Mental Health Center	In-Patient Psychiatry	August 1974 – May 1975

L. Richardson Hospital, Greensboro, NC

### **CERTIFICATION:**

Academy of Certified Social Works (ACSW) 1978 - present

### **CONTINUING EDUCATION:**

<b>Institution and Location</b>	<b>Program</b>	<b>Dates</b>
University of Wisconsin at Madison Department of Adult Education	Rural Mental Health Administration	Summer 1976 Summer 1977
University of North Carolina at Chapel Hill Department of Community Psychiatry	Full Workshop Series: Consultation, Education, and Prevention Professor William Hollister	1976 – 1977

### **PROFESSIONAL EMPLOYMENT HISTORY:**

<b>Agency and Location</b>	<b>Rank or Title</b>	<b>Dates</b>
University of North Carolina at Chapel Hill School of Social Work	Kenan Distinguished Professor William R. Kenan, Jr. Distinguished Professor Professor Associate Professor (Tenure) Assistant Professor	1996 – present 1993 – 1996 1992 – 1993 1988 – 1992 1985 – 1988
WESTAT Corporation Organizational and Marketing Research Group Rockville, Maryland	Sr. Research Scientist	1983 – 1985
SRA Corporation Human Resources Research and Development Center Arlington, VA	Sr. Research Associate	1982 – 1983
Family Research & Analysis, Inc. (Merged with SRA Corp. in Jan. '82) Greensboro, NC	Sr. Research Associate	1979 – 1981
New River Mental Health Center Wilkesboro, NC	Area Coordinator of Children's Services (Five Northwest Counties)	1976 – 1979
Episcopal Child Care Services	24-hour House Parent	1975

Greensboro, NC

Counselor

Part-Time:Caliber Associates, Inc.  
Oakton, VA

Sr. Consulting Associate

1983 – 1985

Dept. of Family & Child Development  
Virginia Polytechnic Institute &  
State University  
Falls Church, VA

Adjunct Professor

1983 – 1985

Dept. of Sociology  
University of North Carolina  
at Greensboro

Instructor

1980

Yakin Valley Nursing Care Clinic  
Yadkinville, NC

Social Work Consultant

1977 – 1978

Dept. of Psychology  
Wilkes Community College  
Wilkesboro, NC

Instructor

1977

**SPECIAL APPOINTMENTS:***Faculty*, Spencer Foundation Education Policy Research Training Program, Center for Child and Family Policy, Duke University, September, 2001-2008.**HONORS AND AWARDS:**

2016 Excellence in Doctoral Student Mentoring Award, School of Social Work, The University of North Carolina at Chapel Hill.

2016 Distinguished Alumni Award, School of Social Work, The University of North Carolina at Chapel Hill.

2016 Dean's Recognition Award for Outstanding Leadership, Impact and Contribution to our Mission of Teaching, Research, and Service, School of Social Work, The University of North Carolina at Chapel Hill.

2013 Inaugural Fellow, The Society for Social Work and Research (SSWR). "Fellows are members who have served with distinction to advance the mission of the Society -- to advance, disseminate, and translate research that addresses issues of social work practice and policy and promotes a diverse, equitable and just society" (SSWR Website).

2013 Distinguished Alumni Award Recipient, School of Health and Human Services, The University of North Carolina at Greensboro

2009-2011, President, National Council on Family Relations

2008 Gerald Seabury Memorial Lecture, School of Social Welfare, University of California, Berkeley

2008 Competitive Kenan Distinguished Research Leave, The University of North Carolina at Chapel Hill

2015, 2011, 2009, 2007, 2006, 2005 Dean's Recognition of Teaching Excellence, UNC-CH School of Social Work

2006 Who's Who in Medicine and Healthcare, 6<sup>th</sup> Edition, 2006-2007

- 2005 Certificate of Appreciation for Outstanding and Dedicated Service from the National Council on Family Relations for Guest Editor for "Families and Communities," *Family Relations: Interdisciplinary Journal of Applied Family Studies*, 54:5
- 2001-2008 Spencer Program Faculty member, Spencer Foundation Education Policy Research Training Program, Duke University
- 2005 Who's Who in American Education, 7<sup>th</sup> Edition, 2006-2007
- 2004 Who's Who in America, 57<sup>th</sup> Edition, 2003; 58<sup>th</sup> Edition
- 2003 Certificate of Appreciation from the Fayetteville MSW Cohort for support and dedication to the success of the UNC-Chapel Hill School of Social Work Fayetteville Part Time MSW Program
- 2003 Finalist, Distinguished Teaching Award for Post-Baccalaureate Instruction, UNC-Chapel Hill
- 2002 Who's Who in Work and Family, Sloan Work and Family Research Network, Boston College
- 2002 School of Social Work Nominee for UNC-Chapel Hill Distinguished Teaching Award for Post-Baccalaureate Instruction
- 2002 Most Innovative Teacher Award, School of Social Work, UNC-Chapel Hill
- 2001 Fellow, National Council on Family Relations
- 2001 Visiting Scholar Recognition, Department of Human Development, Virginia Polytechnic & State University
- 2000 Star Thrower Award, Travis AFB Family Support Center, "You Made A Difference"
- 1998 Alumni Pacesetter Award, School of Human Environmental Sciences, UNC-Greensboro
- 1996-present Kenan Distinguished Professor
- 1996 Top three papers in interpersonal communications, Southern States Communication Association
- 1993-96 William R. Kenan, Jr. Distinguished Professorship
- 1991 Nominated, Speech Communication Association Golden Anniversary Monograph Award
- 1991 International Platform Association (invited)
- 1988 IBM Junior Faculty Development Award, UNC-Chapel Hill Foundation
- 1988, 1989 Nominated by John B. Turner, Dean, for Phillip and Ruth Hettleman Price for Artistic and Scholarly Achievement by Young Faculty, UNC-Chapel Hill
- 1987 Identified as one of 32 most Prolific Family Scholars (1980-87)
- 1983 Fellow, Armed Forces and Society Fellow
- 1982 Outstanding Young Men of America
- 1981 Graduate Student of the Year Award, National Council of Family Relations
- 1980 Doctoral Comprehensive Exams Passed with Honors
- 1978-1981 4.0/4.0 Doctoral Studies Grade Point Average
- 1980 Omicron Nu, Home Economics Honorary (invited)
- 1976 NIMH Fellowship for Graduate Study, UNC-Chapel Hill
- 1975 Graduate cum laude, University of North Carolina at Greensboro
- 1974-75 Dean's List, University of North Carolina at Greensboro

**PUBLICATIONS:****Master's Essay**

Bowen, G. L. (1976). *Comparison of role perceptions between clinical psychology students and psychiatric social work students*. The University of North Carolina at Chapel Hill (with Alice Carlton). Essay Advisor: Dr. Noel Mazade, Community Psychiatry Division

**Dissertation**

Bowen, G. L. (1981). Sex-role preferences and marital quality in the military. The University of North Carolina at Greensboro, *Dissertation Abstracts International*, 42-03A, p. 1336. Dissertation Chair: Dr. Dennis Orthner

**Books**

Moelker, R., Andres, M., Bowen, G. L., & Manigart, P. (Eds.) (2015). *Military families and war in the 21<sup>st</sup> century: Comparative Perspectives*. New York: Routledge.

Bowen, G. L., Rose, R. A., & Bowen, N. A. (2005). *The reliability and validity of the School Success Profile*. Philadelphia, PA: Xlibris Press.  
Foreword by Cynthia Franklin

Bowen, G. L., Orthner, D. K., Martin, J. A., & Mancini, J. A. (2001). *Building community capacity: A manual for U.S. Family Support Centers*. Chapel Hill, NC: Better Image Printing.

Bowen, G. L., & Pittman, J. F. (Eds.). (1995). *The work and family interface: Toward a contextual effects perspective*. Minneapolis, Minnesota: NCFR Press.  
Foreword by Peter M. Blau

Bowen, G. L. (1991). *Navigating the marital journey: MAP, A corporate support program for couples*. New York: Praeger.  
Foreword by Jay A. Mancini

Bowen, G. L., & Orthner, D. K. (Eds.) (1989). *The organization family: Work and family linkages in the U.S. Military*. New York: Praeger.

**Editor: Special Journal Issues**

Roth, M., Bowen, G., & Haragus, P.T. (2010). The social ecology of school success: Implications for policy and practice. *Studia Universitatis Babes-Bolyai, Sociologia*, LV(1).

Woolley, M. E., & Bowen, G. L. (2008). Assessment tools and strategies. Special issue of *Children & Schools*, 30(2). Washington, DC: NASW.

Bowen, G. L., & Woolley, M. E. (2007). Assessment tools and strategies. Special issue of *Children & Schools*, 29(4). Washington, DC: NASW.

Mancini, J. A., & Bowen, G. L. (2006). Qualitative approaches to community research. Special collection of articles in *Family Relations*, 55, 151-189. Minneapolis, MN: The National Council on Family Relations.

Mancini, J. A., & Bowen, G. L. (2005). Families and communities. Special issue of *Family Relations*, 54. Minneapolis, MN: The National Council on Family Relations.

Bowen, G. L., & Richman, J. M. (2002). Schools in the context of communities. Special issue of *Children & Schools*, 24(2). Washington, DC: NASW.

Bowen, G. L., & Scheirer, M. A. (1986). The development and evaluation of human service programs in the military. Special issue of *Evaluation and Program Planning*, 9(3). New York: Pergamon Press.

### **Monographs and Resource Manuals**

Mancini, J. A., & Bowen, G. L. (2014, August). Community capacity building: Supporting military service members and families (NIFA Award No. 2012-48751-20279). The University of Georgia and The University of North Carolina at Chapel Hill. (Preface in addition to 11 Modules)  
DOI: 10.13140/2.1.2521.5048

Terrell, B., & Bowen, G. L. (2008). *Research and assessment* (White Paper). Veterans' Affair Task Force, The Council on Social Work Education (CSWE).

Martin, J. A., Mancini, D. L., Bowen, G. L., Mancini, J. A., & Orthner, D. (2004). *Building strong communities for military families*. National Council on Family Relations Policy Brief. Minneapolis, MN: NCFR. DOI: 10.13140/2.1.4719.6488

Reprinted in ASAGUMO Newspaper, Official Newspaper for Members of Self Defense Force, Japan (20 May 2004).

Bowen, G. L., Martin, J. A., & Mancini, J. A. (1999). *Communities in Blue for the 21<sup>st</sup> century*. Fairfax, VA: Caliber Associates. DOI: 10.13140/2.1.4734.4320  
Foreword by Col John P. Nelson, Ph.D.

Bowen, G. L., Bowen, N. K., & Richman, J. M. (1998). *Students in peril: Crime and violence in neighborhoods and schools*. Chapel Hill, NC: Jordan Institute for Families, School of Social Work, UNC-Chapel Hill. DOI: 10.13140/2.1.3786.8483

Bowen, G. L., Richman, J. M., Bowen, N. K., & Chapman, M. V. (1997). *Contextual risks, social capital, and internal assets among Communities In Schools participants: Comparisons to the National School Success Profile*. Chapel Hill, NC: Jordan Institute for Families, School of Social Work, UNC-Chapel Hill.

Bowen, G. L., Richman, J. M., & Desimone, L. M. (1993). *Toward an understanding of school success: An ecological perspective*. Chapel Hill, NC: The University of North Carolina School of Social Work.

Bowen, G. L., Neenan, P. A., & Warlick, M. T. (1991). *The child day care experiment: The waiting list analysis*. Chapel Hill, NC: University of North Carolina, School of Social Work. (Softbound, 16 pages). Available through ERIC, Clearinghouse on Elementary and Early Childhood Education, ED # 330 460.

- Bowen, G. L., & Neenan, P. A. (1988). *Information and referral: An essential component in the human service network*. Washington, DC: Department of the Air Force, Office of Family Matters. (Softbound, 26 pages)
- Bowen, G. L., & Janofsky, B. J. (1987). *Strategies for family ministry in the U.S. Army: The value-behavior congruency model of family adaptation*. Washington, DC: Department of the Army, Office of the Chief of Chaplains. (Softbound, 68 pages)
- Bowen, G. L., Straus, M. A., Sedlak, A. J., Sugarman, D. B., & Hotaling, G. T. (Eds.). (1985). *Toward a domestic violence surveillance system: Strategies, issues, and prospects*. Rockville, MD: Westat, Inc. and The Family Research Laboratory. (Softbound, 306 pages)
- Bowen, G. L., Straus, M. A., Sedlak, A. J., Hotaling, G. T., & Sugarman, D. B. (Eds.). (1984). *Domestic violence surveillance system feasibility study: Identification of outcomes and risk factors*. Rockville, MD: Westat, Inc. and The Family Research Laboratory. (Softbound, 201 pages)
- Orthner, D. K., & Bowen, G. L. (1983). *Families in blue: Opportunities for ministry*. Washington, DC: Government Printing Office. DOI: 10.13140/RG.2.1.2992.0168
- Orthner, D. K., & Bowen, G. L. (1982). *Families in blue: Insights from Air Force families in the Pacific*. Greensboro, NC: SRA Corporation.
- Weller, E., Mancini, J., Bowen, G. L., & Orthner, D. K. (1981). *Family development: A source book*. Greensboro, NC: Family Development Press.
- Bowen, G. L. (1981). *Air Force family stress: Implications for Air Force Chaplains*. Greensboro, NC: Family Research & Analysis, Inc.
- Orthner, D. K. (1980). (Assisted by Bowen, G. L., Brown, R., Orthner, B., and Mancini, J. A.). *Families in blue: A study of married and single parent families in the U.S. Air Force*. Washington, DC: Department of the Air Force.

### **Practice Guides**

- Bowen, G. L. (with Ipsos Public Affairs). (2014, January). *Air Force Community Action Plan Handbook*. Washington, DC: Ipsos Public Affairs. [Results-focused planning guide used to train Integrated Delivery System members at every AF base worldwide in using results from the 2014 Community Assessment for responding to priority issues of service members and their families]
- Bowen, G. L. (2007, October). *The Personal Assets Inventory user's guide*. Washington, DC: United States Air Force.
- Bowen, G. L., & Martin, J. A. (2005, November). *The Unit Assets Inventory user's guide: From A to Z*. Colorado Springs, CO: U.S. Air Force Space Command Family Matters.
- Bowen, G. L., & Rose, R. A. (2005, January). *School Success Profile-Intervention Package: Program Manual*. Chapel Hill, NC: School of Social Work, The University of North Carolina at Chapel Hill.

- Nelson, G., Nelson, G. M., & Bowen, G. L. (2004, March). *School success case method: The language and practice of success* (Facilitator Notebook). Chapel Hill, NC: The University of North Carolina at Chapel Hill.
- Nelson, G., Nelson, G. M., & Bowen, G. L. (2004, March). *School success case method: The language and practice of success* (Participant Notebook). Chapel Hill, NC: The University of North Carolina at Chapel Hill.
- Nelson, G., Nelson, G. M., & Bowen, G. L. (2004, March). *School success case method: The language and practice of success* (Training Slides). Chapel Hill, NC: The University of North Carolina at Chapel Hill.
- Orthner, D., Bowen, G., & Mancini, D. (2003, December). *The community readiness unit service guide for Air Force Space Command Family Support Centers*. Colorado Springs, CO: U.S. Air Force Space Command Family Matters.
- This practice guide was used by Shipley Communications, Inc. as the core component of a 4-day training curriculum to train AF Family Support Center staffs worldwide (44 total training sessions).
- Orthner, D., Bowen, G., Mancini, D., & Martin, J. (2003, December). *The community readiness customer service guide for Air Force Space Command Family Support Centers*. Colorado Springs, CO: U.S. Air Force Space Command Family Matters.

### **Book Chapters**

- Bowen, G. L., & Martin, J. A. (2015). Building community capacity in the U.S. Air Force: Promoting a community practice strategy. In K. Corcoran & A. R. Roberts (Eds.), *Social workers desk reference* (3<sup>rd</sup> ed.) (pp. 935-940). New York: Oxford University Press.
- Farrell, A. F., Bowen, G. L., & Goodrich, S. A. (2015). Strengthening family resilience: A community capacity approach. In J. A. Arditti (Ed.), *Family problems: Stress, risk, and resilience*. New York: Wiley/Blackwell.
- Bowen, G., Martin, J., Mancini, J., & Swick, D. (2015). Community capacity and the psychological well-being of married United States Air Force members. In R. Moelker, M. Andres, G. Bowen, & P. Manigart (Eds.), *Military families and war in the 21st century: Comparative Perspectives* (pp. 210-226). Abingdon Oxon: Routledge.
- Andres, M., Bowen, G., Manigart, P., & Moelker, R. (2015). Epilogue. In R. Moelker, M. Andres, G. Bowen, & P. Manigart (Eds.), *Military families and war in the 21st century: Comparative Perspectives* (pp. 319-330). Abingdon Oxon: Routledge.
- Swick, D. C., Bowen, G. L., & Allen-Meares, P. (2015). Perspectives in school social work services. In P. Allen-Meares, *Social work services in schools* (7<sup>th</sup> ed., pp. 54-75). Boston: Pearson Education, Inc.
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## **Measures**

Bowen, G. L., & Richman, J. M. *School Success Profile*. Chapel Hill, NC: Jordan Institute for Families, School of Social Work, The University of North Carolina at Chapel Hill.

**DOI:** 10.13140/2.1.3038.2885

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 Neighborhood Youth Behavior (1993, 1997, 2001, 2005)  
 Neighborhood Safety (1993, 1997, 2001, 2005)  
 Learning Climate (2005)  
 School Satisfaction (1993, 1997, 2001, 2005)  
 Teacher Support (1993, 1997, 2001, 2005)  
 Academic Rigor (2008)  
 Academic Relevancy (2008)  
 School Safety (1993, 1997, 2001, 2005)  
 Micro Interactions (2008)  
 Friend Support (1993, 1997, 2001, 2005)  
 Peer Group Acceptance (1993, 1997, 2001, 2005)  
 Friend Behavior (1997, 2001, 2005)  
 Family Together (1993, 1997, 2001, 2005)  
 Parent Support (1993, 1997, 2001, 2005)  
 Home Academic Environment (1993, 1997, 2001, 2005)  
 Parent Education Support (1993, 1997, 2001, 2005)  
 School Behavior Expectations (1997, 2001, 2005)  
 Social Support (1993, 1997, 2001, 2005)  
 Religious Orientation (2008)  
 Physical Health (1993, 1997, 2001, 2005)  
 Body Weight (2008)  
 Happiness (1993, 1997, 2001, 2005)  
 Personal Adjustment (1993, 1997, 2001, 2005)  
 Self-esteem (1993, 1997, 2001, 2005)  
 Sense of School Coherence (1993, 1997)  
 School Engagement (1993, 1997, 2001, 2005)  
 Extracurricular Participation (2008)  
 Trouble Avoidance (1993, 1997, 2001, 2005)  
 Success Orientation (2008)  
 Academic Performance (1993, 1997, 2001, 2005)

Bowen, G. L., & Powers, J. D. (2008). *School Success Profile-Learning Organization (SSP-LO)*. Chapel Hill: University of North Carolina at Chapel Hill, School of Social Work, Jordan Institute for Families. (Leadership Dimensions: Direction, Support, Learning, Humility)

Bowen, G. L., & Powers, J. D. (2003). *School Success Profile-Learning Organization (SSP-LO)*. Chapel Hill: University of North Carolina at Chapel Hill, School of Social Work, Jordan Institute for Families.

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### **Video**

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### **Audio**

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### **Workshop Training Manuals**

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Bowen, G. L. (1982). *Trends and issues in military families.* Prepared for the 1982 Navy Family Service Center Director's Training Session in Springfield, VA. Washington, DC: SRA Corporation.

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### **Major Survey Questionnaires**

Bowen, G. L., & Mancini, J. A. (2014, all rights reserved). *Individual and Community Readiness Inventory* (ICRI). Developed by The University of Georgia and The University of North Carolina at Chapel Hill under sponsorship from the United States Department of Agriculture and United States Department of Defense (NIFA Award No. 2012-48751-20279). The ICRI provides an easy-to-use and easy-to-interpret web-based assessment tool for informing community capacity planning and evaluation efforts at local, state, regional, and national levels. The assessment tool is applicable for use in the Active and Reserve components of the U.S. Military, including the National Guard and the Air National Guard, and separate versions of the assessment tool are available for military members and the civilian spouses of these members. The ICRI fills an important void in the availability of short, highly focused assessment tools that are designed to assess the ability of military members and the spouses of military members to manage life challenges associated with the military lifestyle. The tool also includes measures of informal and formal resources for promoting and sustaining the readiness and preparedness of military families in the communities in which they live. The ICRI incorporates cutting-edge software in its design, administration, and reporting features.

Bowen, G. L., & Martin, J. A. (2013). *Marine Corps Fitness Improvement Tool* (MCFIT). Charlotte, NC: Flying Bridge Technologies. (Sponsored by Semper Fit and Exchange Services Division (MR) through contract H0312-D-0002. Online survey designed for administration to population of Marines (Active and Reserve Component), which assessed four dimensions: Fitness, Performance, Support, and Assistance.

Martin, J. A., & Bowen, G. L. (2009, 2010). *The Marine Support Profile*. Charlotte, NC: Flying Bridge Technologies. Online survey designed for administration to parents, extended families, and loved one of Marines (Active and Reserve Component). DOI: 10.13140/RG.2.1.1157.5846

Bowen, G. L., & Martin, J. A. (2009, 2011). *Support and Resiliency Inventory-AF Members*. Chapel Hill, NC: School of Social Work, The University of North Carolina at Chapel Hill. Online survey designed for administration to population of AF Members (Active and Reserve Component), which assessed four dimensions: trust in informal networks, trust in formal systems, AF fitness (physical, mental, social, & spiritual), positive behaviors, and resiliency. DOI: 10.13140/RG.2.1.1943.4402

Bowen, G. L., & Martin, J. A. (2009, 2011). *Support and Resiliency Inventory-AF Civilian Spouses*. Chapel Hill, NC: School of Social Work, The University of North Carolina at Chapel Hill. Online survey designed for administration to population of civilian spouses of AF Members (Active and Reserve Component), which assessed four dimensions: trust in informal networks, trust in formal systems, AF fitness (physical, mental, social, & spiritual), positive behaviors, and resiliency.

Bowen, G. L., & Martin, J. A. (2010). *The Family Readiness Assessment Tool* (FRAT). Quantico, VA: United States Marine Corps.

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- Bowen, G. L., & Martin, J. A. (2007). *Personal Assets Inventory*. Chapel Hill, NC: School of Social Work, The University of North Carolina at Chapel Hill.
- Bowen, G. L., & Martin, J. A. (2004). *Unit Assets Inventory*. Chapel Hill, NC: School of Social Work, The University of North Carolina at Chapel Hill.
- Bowen, G. L. (2004). *The United States Air Force-Learning Organization*. Chapel Hill, NC: School of Social Work, The University of North Carolina at Chapel Hill.
- Bowen, G. L., & Powers, J. D. (2003, 2004, 2005, 2008). *School Success Profile-Learning Organization (SSP-LO)*. Chapel Hill, NC: School of Social Work, The University of North Carolina at Chapel Hill.
- Martin, J. A., & Bowen, G. L. (2003). *2002 Air Force Community Assessment: Reference Matrix (F41622-03-M-1026)*. San Antonio, TX: Brooks Air Force Base (AFMOA/SGZF).
- Bowen, G. L., Martin, J. A., Mancini, J. A., & Orthner, D. K. (2002). *Air Force Community Assessment Survey (Active Duty Members/Civilian Spouses)*. San Antonio, TX: Department of the Air Force.
- Bowen, G. L., Bowen, N. K., & Richman, J. M. (2002). *The Elementary School Success Profile (ESSP)*. Chapel Hill, NC: School of Social Work, The University of North Carolina at Chapel Hill.
- Bowen, G. L., & Richman, J. M. (1993). *School Success Profile*. Chapel Hill, NC: School of Social Work, The University of North Carolina at Chapel Hill. (Revised: 1995, 1997, 2001, 2005, 2008)
- Endorsed as a Model Program by the National Dropout Prevention Center, Clemson University.*
- Orthner, D. K., & Bowen, G. L. (1994, Revised 1997). *Adaptation to Army life survey*. Alexandria, VA: U.S. Army Research Institute.
- Bowen, G. L. (1991, May). *NCFR 1991 Membership Survey*. Minneapolis, MN: National Council on Family Relations.
- Bowen, G. L., & Neenan, P. A. (1989, February). *Employment and Child Care Study* (Contract No. 90CW0794/01), Washington, DC, Office of Family Support, Administration for Children, Youth and Families, Department of Health and Human Services.
- Bowen, G. L. (1988, January). *Profile of Work and Family: E. I. DuPont*. Chapel Hill, NC: The University of North Carolina at Chapel Hill.
- Bowen, G. L. (1987, October). *Work and Family Linkages: A Survey of Families at E.I. DuPont*. Wilmington, DE: E.I. Dupont.
- Bowen, G. L., & Rudin, B. F. (1987, April). *Profile of Family Strength and Adaptation to Army Life* (Contract No. MDA903-86-C-0260). Three new scales: Family Values Profile, Family Behavior Profile, Army Family Environment Profile. Washington, DC: Department of the Army, Office of Chief of Chaplains.

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Bowen, G. L. (1984, Winter). *A Study of Air Force Life* (Contract No. F49642-83-C0159). Washington, DC: Department of the Air Force, Office of Family Matters. Four versions: (a) Air Force Married Members, (b) Civilian Spouses, (c) Air Force Single Members, (d) Adolescent Sons and Daughters of Air Force Members.

Orthner, D. K., & Bowen, G. L. (1981, Spring). *Families-in-Blue: A Worldwide Study of Air Force Family Life* (Contract No. F33600-81-C-0029). Washington, DC: Department of the Air Force, Office of the Chief of Chaplains. Three Versions: (a) Air Force Married Members-Male; (b) Air Force Married Members-Female; (c) Air Force Single Parents.

### **National Council on Family Relations: President's Report**

Bowen, G. L. (2010). Navigating our future. *NCFR Report*, 55(1), 3-4.

Bowen, G. L. (2010). Measuring our success. *NCFR Report*, 55(2), 5-6.

Bowen, G. L. (2010). Increasing our accountability. *NCFR Report*, 55(3), 3.

Bowen, G. L. (2010). Honoring NCFR members who pass away. *NCFR Report*, 55(4), 3.

Bowen, G. L. (2011). Life goes on: Getting the job done! *NCFR Report*, 56(1), 3, 5.

Bowen, G. L. (2011). Waving the NCFR flag. *NCFR Report*, 56(2), 5, 7.

Bowen, G. L. (2011). Increasing international diversity in NCFR's membership. *NCFR Report*, 56(3).

Bowen, G. L. (2011). Passing the baton. *NCFR Report*, 56(4), 3.

### **Newsletter Articles**

Bowen, G. L. (2000, Spring). Beyond Columbine: Lessons for parents, educators and community leaders. *Contact: A Newsletter for School of Social Work Alumni and Friends*, 17(1), p. 6.

Bowen, G. L. (1992, Winter). Survey results presented at association of councils workshop. *Feedback*, pp. 4-5. (Published by the Association of Councils of the National Council on Family Relations)

### **Popular Articles**

Bowen, G. L. (1982, August 26). Children's reaction to death. *Greensboro Daily News and Record*, p. C9.

Bowen, G. L. (1982, July 11). Concept of death is difficult for children to understand. *Greensboro Daily News and Record*, p. C5.

Bowen, G. L. (1977, February 10). Explaining death to a child. *The Journal-Patriot*, p. C16.

Bowen, G. L. (1976, November 8). Children's view of death. *The Journal-Patriot*, p. C12.

Bowen, G. L. (1976, October 25). Anxiety and you. *The Journal-Patriot*, p. C14.

## **EDITORIAL BOARDS: JOURNALS**

### Present

Children & Schools (2009-present)

Best Practices in Mental Health: An International Journal (2005-present)

Family Relations (2000-present)

### Past

Journal of Family and Economic Issues (1993-2013)

Journal of Community Practice (2004-2012)

Evaluation and Program Planning (1991-2012)

Brief Treatment and Crisis Intervention (2001-2009)

Children & Schools (2001-2002)

Social Work in Education (1998-2000)

Military Family Issues: The Research Digest (1995-1999)

Family Relations (1986-1996)

## **EDITORIAL REVIEWER: JOURNAL**

American Educational Research Journal (2013)

American Journal of Community Psychology (2012)

Children and Youth Services Review (2011)

Studia Sociologia (2010)

American Journal of Orthopsychiatry (2009)

Social Forces (2005, 2013, 2015)

Journal of Marital and Family Therapy (2006)

Sociological Focus (2006)

Social Service Review (2006, 2007, 2014)

Journal of Community Practice (2003)

Social Problems (2003)

Journal of Applied Communication Research (2002)

Violence and Victims (2000)

Journal of Social and Personal Relationships (1996, 1997)

Journal of Marriage and Family (1981-present, 2009, 2013)

Research on Social Work Practice (1992, 1997)

Journal of Family and Economic Issues (1992)

Gender & Society (1996)

Journal of Family Issues (1991, 1996, 2000, 2006)

Evaluation and Program Planning (1984-1991)

Military Family (1981-2000)

Military Psychology (2000, 2001)

Families in Society (1990-)

Social Casework (1986-1989)

Social Work Research (1999-2001)

Family Science Review (1989)

Psychology of Women Quarterly (1989)

Armed Forces and Society (1989, 2015)

Journal of Early Adolescence (1989)

Journal of Family Theory and Review (2015)

Learning Organization (2016)

## **EDITORIAL BOARDS/REVIEWER: BOOKS**

Franklin, C., Harris, M. B., & Allen-Meares, P. (Eds.). (2013). *The School Services Sourcebook: A Guide for Social Workers, Counselors, and Mental Health Professionals* (2<sup>nd</sup> Ed.). New York: Oxford University Press.

Franklin, C., Harris, M. B., & Allen-Meares, P. (Eds.). (2006). *The School Services Sourcebook: A Guide for Social Workers, Counselors, and Mental Health Professionals*. New York: Oxford University Press.

Roberts, A. R., & Greene, G. J. (Eds.). (2002). *Social Workers' Desk Reference*. New York: Oxford University Press.

## **BOOK PUBLISHERS:**

Cambridge University Press (2008), Manuscript Reviewer

Oxford University Press (2002-present), Manuscript Reviewer

Series Editor (1989 to 1992): Work, Family, and Society; Praeger Publishers, New York

## **OFFICES HELD IN PROFESSIONAL ORGANIZATIONS:**

### **National**

President (2009-2011). National Council on Family Relations.

President-Elect (2007-2009). National Council on Family Relations.

Chair (1994-1995). Theory Construction and Research Methodology Workshop, National Council on Family Relations. (Elected Position)

Member, (1994-1995). Program Planning Committee, National Council on Family Relations.

Committee Member (1991-1993). Strategic Planning Committee, National Council on Family Relations. Appointed by Brent C. Miller, President, NCFR. Chair: Felix M. Berardo.

Membership Vice President (1990-1992). National Council on Family Relations. (Elected Position)

Workshop Co-Chair (1987). Post Conference Workshop on Youth in Military Families, National Council on Family Relations, Atlanta, Georgia.

Committee Member (1983-1985). President's Commission on the Structure of the National Council on Family Relations. (Chair: Dr. Dennis Orthner)

Co-Chair (1982). Pre-Conference Workshop on Family Life in the Military. National Council on Family Relations, Washington, DC. (Co-Chair: Dr. Dennis Orthner)

Committee Member (1982). Student Award Committee, National Council on Family Relations.

Workshop Coordinator (1980). Pre-Conference Workshop on the Quality of Family Life in the Military, National Council on Family Relations, Portland, Oregon.

### **Regional**

Theory Chair (1980), Southeastern Conference on the Family and the Child, Greensboro, NC.

### **State**

Past President (1997-1998). Family Council of North Carolina.

President (1994-1996). Family Council of North Carolina.

President-Elect (1992-1994). Family Council of North Carolina.

Member (1991-1992). North Carolina Advisory Board of the Early Education and Care Leadership Development Project (Chair: Donald Stedman, Dean, UNC-CH School of Education)

Editor (1991-1992). *The Council Record, Newsletter of the North Carolina Family Life Council, Inc.*, Affiliate of the National Council on Family Relations.

Second Vice President (1991-1992). North Carolina Family Life Council.

Conference Chairperson (1990). North Carolina Family Life Council.

Research Chairperson (1989-Present). North Carolina Family Life Council.

Symposium Planning Committee (1988-1990). Residential Child Care in England and the Carolinas: Challenges and Opportunities. Symposium sponsored by funds from The Duke Endowment.

Co-Coordinator (1986). Conference on "Serving Military Families: An Emerging Area of Social Work Practice," Fayetteville, NC.

Chair (1978). Wilkes County Task Force for Children, Wilkes County, NC.

Chair (1978). Wilkes County Big Brother/Big Sister Program, Wilkes County, NC.

### **PRESENT MEMBERSHIP IN PROFESSIONAL ORGANIZATIONS:**

Society for Social Work and Research

National Council on Family Relations (Fellow)

Groves Conference on Marriage and the Family (Honorary, Invited: 1991)

Inter-University Seminar on Armed Forces and Society (Fellow: 1983)

Academy of Certified Social Workers

National Dropout Prevention Network

Southeastern Council on Family Relations

## **PAST MEMBERSHIPS**

National Association of Social Workers (1976-2014)  
 International Society for the Study of Personal Relationships  
 Council on Social Work Education  
 North Carolina Family Life Council, Inc. (no longer in operation)  
 Omicron Nu National Honor Society

## **ADVISORY BOARDS**

(2014, October-present). National Advisory Board for *Developing a Model for Delivering School-Based Mentoring to Students in Military Families* project, Department of Psychological Science, University of Arkansas. Principal Investigator: Dr. Timothy A. Cavell)

(2011, March-present). National Advisory Board for the *Building Capacity for Military-Connected Schools* project, University of Southern California. (Principal Investigator: Dr. Ron Avi Astor)

(2009, November-2011). North Carolina Institute of Medicine (NCIOM) Task Force to Study Mental Health, Developmental Disabilities and Substance Abuse Services to Current and Former Members of the Armed Forces and their Families, Co-Chairs: Rep. Grier Martin, Rep. William R. Purcell, and Michael Watson, Assistant Secretary for MHDDSAS, NC Department of Health and Human Services.

(2009, March – 2011). National Advisory Board, Children's Bureau Healthy Relationship & Marriage Education Training Project, Co-project Directors: Dr. David Schram and Dr. Francesca Adler-Baeder)

(2009, January-2011). The Homeless Veterans Task Force, The Governor's Focus on Returning Combat Veterans and their Families, Chair, The Honorable Grier Martin, NC House of Representatives.

## **NONPROFIT BOARDS (NEW SECTION, DECEMBER 2009)**

(2001-2016). Board of Directors, National Learning Institute, Oakton, VA

## **GRANT/CONTRACT REVIEW PANELS (NEW SECTION, MAY 2013)**

(2013, May), Member, NIH Advisory Committee, "Technological Tools to Facilitate Implementation of Evidence-Based Substance Abuse Prevention Interventions among the Military" (N43-DA-14-5577). NIDA Point of Contact: Nadine Rogers (NIH/NIDA)

## **TENURE AND PROMOTION REVIEWS (NEW SECTION, AUGUST 2009)**

(2014, February), Bar-Ilan University, School of Social Work, Promotion to Associate Professor to Professor.

(2013, October), University of South Carolina, College of Social Work, Promotion from Assistant Professor to Associated Professor with Tenure.

(2013, August), Arizona State University, College of Public Programs, Promotion from Assistant Professor to Associate Professor with Tenure.

(2012, September), University of California, Berkeley, School of Social Welfare, Promotion from Associate Professor to Full Professor.

(2010, September), The University of Kansas, School of Social Welfare, Promotion from Assistant Professor to Associate Professor with tenure.

(2010, August), University at Buffalo, School of Social Work, Promotion from Associate Professor to Professor.

(2010, February), Washington University in St. Louis, George Warren Brown School of Social Work, Promotion from Associate Professor to Professor.

(2010, January), The Hebrew University of Jerusalem, Paul Baerwald School of Social Work & Social Welfare, Promotion from Lecturer to Senior Lecturer with tenure.

(2009, November), Wayne State University, School of Social Work, Promotion from Assistant to Associate with tenure.

(2009, September), University of Tennessee, School of Social Work, Promotion from Associate to Full.

(2009, August), Syracuse University, School of Social Work, Promotion from Assistant to Associate Professor with tenure.

#### **CONFERENCE PLANNING STEERING COMMITTEES (NEW SECTION, MARCH 2013)**

(2012-2013), Steering Committee Member, National Research Summit on Reserve Component Military Families, University of Michigan – Ann Arbor, April 25 & 26, 2013 (Conference Chairs: Michelle Kees and John Greden).

#### **INVITED UNIVERSITY LECTURES/CONSULTATIONS (NEW SECTION, AUGUST 2009)**

(2015, August 05), Invited Presenter, “The Way Forward: A Foundational Framework for Evidence-based Practice in Secondary Prevention,” 2015 AF Family Advocacy Prevention Training Outreach Managers, San Antonio, Texas. (With Todd Jensen, Ph.D. Student)

(2015, June 03), Invited Presenter, “The Way Forward: A Foundational Framework for Evidence-based Practice in Secondary Prevention,” 2015 AF Family Advocacy Prevention Training Family Advocacy Officers, San Antonio, Texas.

(2014, March 13), Invited Presenter, “Training Camp Directors for Serving Military Youth with an Injured for Fallen Parent,” Morrisville, NC: Camp Corral, Golden Corral Corporation.

(2014, January 13-16), Invited Presenter, “Theoretical Perspectives of Family Resilience: The Case of Military Families,” Research Workshop of the Israel Science Foundation, Bar Ilan University, Tel Aviv, Israel. (Organizer: Professor Rachel Dekel)

(2013, December 13), Invited Speaker with Dr. Jay A. Mancini, “In Conclusion . . . It’s all about Networks and Networks and All about Connections . . . and Connections are all about Relationships. Department of Psychology, LMU Ludwig-Maximilians-Universität München.

(2013, April 26), Plenary Speaker, “Innovative Approaches to Reaching Families: Community Capacity Building, National Research Summit on Reserve Component Military Families, University of Michigan.

(2012, June 21), Invited Speaker, “A Model of Resiliency in Military Families: Having, Being, Doing,” Canadian Defence Personnel Research Symposium, Ottawa, Ontario.

(2012, April 24), Opening Plenary Speaker, “Community Capacity Building (CCB): Formal and Informal Networks, 2012 National Guard Bureau Professional Development Seminar, Atlanta, GA.

(2012, February 1), Invited Speaker, “Cornerstones of Resilience: Having, Being, and Doing,” 2012 Military Health System Conference, Gaylord National Hotel & Resort, National Harbor, MD.

(2011, October 13-14), Invited Speaker/Faculty Research Consultant, “Military Family Resilience: Having, Being, & Doing,” Department of Family Science, School of Public Health, University of Maryland, College Park. (with Dr. James A. Martin)

(2011, August 22), Invited Speaker/Participant, “The 2011 Support and Resiliency Inventory for USAF Total Force Members, Presented at the AF Resilience Planning Session (HQ USAF/A1SY), Crystal City, VA.

(2011, May 20-21), Keynote Speaker, “Family Social Capital and the School Success of Middle School Students: An Intervention Research Perspective.” Presented at the 2011 International Conference on Families as Social Capital, Seoul National University, Korea.

(2011, April 26), Workshop, “Supporting Military Families with Children who have Developmental Disabilities: A Community Resilience Approach.” Presented at the Forging the Partnership 2011 DoD/USDA Family Resilience Conference, Chicago, Illinois. (Gary L. Bowen & Irene Nathan Zipper)

(2011, April 21), Keynote Speaker, “Pathways to School Success: A Risk and Resilience Perspective,” Developmental Resilience Symposium, Department of Human Development & Family Studies and the School of Education, University of Delaware, Newark, DE. (One-day symposium also included Dr. Ann Masten, Dr. Sharon Landesman Ramey, and Dr. Craig T. Ramey).

(2011, April 8), Keynote Speaker, “Pathways to School Success, Inside the Schoolhouse Door Conference XIII, Southern Connecticut State University, New Haven, CT.

(2011, March 3), Keynote Speaker, “Military Family Resiliency: A Capacity Building Perspective,” Southeastern Council on Family Relations 2011 Conference, Birmingham, AL.

(2011, February 24), Faculty/Student Invited Speaker, “‘Storylines of Research:’ Pathways to School Persistence.” Department of Child and Family Development, The University of Georgia.

(2010, November 12), Keynote Speaker, “Formal Systems and Informal Networks of Support.” Meeting the Needs of Veterans & Military Families: A Summit for Health & Human Services Professionals, School of Social Work, University of Missouri, Columbia, Missouri (Invited by Dr. Marjorie Sable, Director, MU School of Social Work).

(2010, October 21), Invited Community Presentation, “When Johnny and Jane Come Marching Home from War, Then What?” (Presentation to Seymour Center Village Elders, Robert & Pearl Seymour Senior Center, Chapel Hill, NC.)

(2010, October 15), Invited Plenary Speaker, “Resiliency,” Air Mobility Command (Fall Rally, October 13-15), Scott Air Force Base, IL. (Presentation to Gen Raymond E. Johns, Jr., Lt Gen Vern M. “Rusty” Findley II, Chief Master Sergeant David E. Spector, and Wing Commanders and Chiefs from all Air Mobility Command bases.)

(2010, September 20), Plenary Speaker with Dr. James Martin, “Resiliency Research Update,” Air Force Resiliency Workshop, Andrews Air Force Base, Sponsored by the Air Force Resiliency Program Division (HQ/AF A1SS).

(2010, August 24-25), Plenary Speaker, “The Road of Life: Social Connections, Individual Assets, and Resiliency,” 2010 Air Force Materiel Command Integrated Delivery System Training & Conference, Dayton, Ohio.

(2010, August 19), Co-Faculty Trainer with Irene Nathan Zipper, “Strengthening Military Families with Children who have Special Needs: OneStop for Family Support” (4 hour training). Eastern AHEC Annual Children’s Services State of the Art Conference, Atlantic Beach, NC.

(2010, June 2), Co-Plenary Speaker with Dr. James Martin, “Resilience: A Road of Life Perspective,” 2010 Navy Family Summit, Key Bridge Marriott, Arlington, VA. The Navy Family Summit is a three-day event with a panel of subject matter experts to understand and address the needs of Navy and Marine Corps families.

(2010, May 4), Invited Presenter, “Support and Resiliency: A Community Capacity-Building Research Agenda,” University of Southern California Military Family Research Workshop, Washington, DC. Attendees included representatives from NIMH, NIDA, NICHD, and the White House.

(2010, April 19), Plenary Speaker, “Family Resiliency,” 2010 United States Air Force Caring for People Forum, Crystal City, VA. Invited by Eliza G. Nesmith, YC-03, Chief, Airman and Family Services Division, HQ USAF/A1SA.

(2010, April 7-8), Invited Participant, 2010 International Research Symposium on Military Families, Sheraton City Centre, Indianapolis, Indiana. Sponsored by The Military Family Research Institute at Purdue University & The Center for Deployment Psychology.

(2010, March), Invited Presentation to the North Carolina Institute of Medicine Task Force on Behavioral Health Services for the Military and their Families, Morrisville, NC: “Support and Resiliency: A Road of Life Perspective.” (Sponsor: The Honorable Grier Martin, JD., LLM, Representative, NC House of Representatives, the Honorable William Purcell, MD, Senator, North Carolina Senate, and Michael Watson, Assistant Secretary for Mental Health, Developmental Disabilities and Substance Abuse Services, NC Department of Health and Human Services.

(2010, February), Invited Briefing for the Warfighter and Family Program Managers from the Army, Navy, Air Force and Marines, Office of the Deputy Under Secretary of Defense, Military Community & Family Policy, The Pentagon; Washington, DC (Sponsor: Gerry Carlon, Senior Policy Analyst).

(2009, November), Invited discussant and speaker, November 2009 meeting of the Carolina Consortium on Human Development, fall seminar series on motivation and school engagement. Dr. Bowen discussed the School Success Profile and his recent research on pathways to school persistence. The Carolina Consortium on Human Development was established by faculty at UNC-CH, Duke, NC State, and UNC-

Greensboro as an institute for advanced study in developmental science. In addition to faculty, the proseminar is attended by pre- and post-doctoral fellows.

(2009, November). Featured speaker and panelist at the 2009 RTI Fellows Symposium: Integrating Basic and Applied Research. Dr. Bowen discussed “Pathways to School Persistence” in the section on Education Opportunity and Achievement, which was organized by Laura Knapp, RTI researcher. Dr. Bowen served on a panel with Dr. Elizabeth Glennie, Senior Research Education Analyst at RTI International; Dr. Jacqueline King, Assistant Vice President, Center for Policy Analysis, American Council on Education; and Mr. Jamie Merisotis, President and CEO, Lumina Foundation for Education.

(2009, August), University of Georgia, Center for Family Research, Athens, Georgia (Dr. Gene Brody, Director).

#### **FUNDING PROPOSAL REVIEWS/REVIEW PANELS (NEW SECTION, DECEMBER 2008)**

(2009, December), Proposal Reviewer, Innovation Program, NC Translational and Clinical Sciences Institute (NC TraCS), The University of North Carolina at Chapel Hill.

(2009, August), Member of Review Committee for “ARRA Grand Opportunities: Prevention and Infrastructure,” National Institutes of Health, National Institute on Drug Abuse.

(2008, December), Proposal Reviewer, Innovation Program, NC Translational and Clinical Sciences Institute (NC TraCS), The University of North Carolina at Chapel Hill.

#### **CONSULTATIONS AND PROFESSIONAL ACTIVITIES:**

(2014-2015), Consultant, Dr. Danny Perkins, Clearinghouse for Military Family Readiness, The Pennsylvania State University, Quality Review of AF Community Assessment Survey for the Air Force Medical Operations Agency, San Antonio, Texas. The tasker to review the 2013 Air Force Community Assessment Survey (AFCAS) was initiated from concerns expressed about the survey at the 22 May 2014 Air Force Community Action Information Board (CAIB) meeting. The AF CAIB instituted a one-year pause in administration of the AFCAS during FY 2015. This pause was implemented to enable the Air Force Surgeon General (AF/SG) to assign the Air Force Medical Operations Agency/Mental Health Division (AFMOA/SGHW) the task of conducting a comprehensive qualitative review of the AFCAS including key users’ concerns. Among the concerns expressed at that CAIB meeting were questions about the survey’s focus, length, and response rate. AFMOA contracted with the Clearinghouse for Military Family Readiness (Clearinghouse) at Penn State University to conduct a qualitative review to examine the utility of the AFCAS. The purpose of this qualitative review is to provide the CAIB with “courses of action (COAs) and recommendations for future iterations of the AFCAS. This qualitative review was divided into three major components: (a) group and individual feedback sessions with key users of the AFCAS at Air Staff, Air Force Major Commands (MAJCOMs), and installations to fully understand strengths and limitations of the current AFCAS; (b) content analysis of MAJCOM and installation-level Community Action Plans (CAPs) to understand the role of AFCAS in the development of CAPs; and (c) an extensive item and scale review of the revised 2015 AFCAS was conducted.

(2014-2015). Expert Panel Member, North Carolina Coalition Against Domestic (NCCADV), Durham, NC (Jen Counts, Prevention Program Specialist). Using the Systematic Screening and Assessment Method, assisted in identifying a set of promising community programs for developing practice-based evidence around collective efficacy and violence prevention. The project involved reviewing evaluability assessments of four local organizations across NC to build collective efficacy at the community level,

which were completed by student Capstone teams from the Gillings School of Global Public Health Department of Health Behavior. Peer review was provided via two phone conferences.

(2014). Consultant, Council on Accreditation, New York, New York. Review panel on Standards for Community Capacity Building, DoD Family Readiness Program. (Melissa D. Dury, LCSW, Associate Director of Standards Development)

(2014). Consultant, Ipsos Public Affairs, Washington, DC. Developed handbook on Results-focused Planning to train AF human service professional worldwide in using the results from the 2013 AF Community Assessment for policy and program planning.

(2011-2012). Consultant, University of Southern California (USC), Building Capacity to Create Highly Supportive Military-Connected School Districts, which is a four-year, \$7.6 million consortium project funded by the Department of Defense Education Activity (DoDEA) partnership program to support military children attending public schools (PIs: Dr. Ron Avi Astor, USC, and Dr. Rami Benbenishty, Bar Ilan University & Haruv Institute)

(2000, 2001, 2002, 2003, 2004, 2005, 2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016). Abstract Reviewer, Society for Social Work and Research Conference (SSWR).

(2003, 2004, 2005, 2006, 2007, 2008, 2009, 2010, 2011). Member, Dissertation Award Committee, Society for Social Work and Research (SSWR).

(1999, 2000, 2001, 2002, 2003, 2011, 2012, 2013, 2014, 2015, 2016). Member, Awards Committee for Excellence in Research Award, Society for Social Work Research (SSWR).

(2007, 2008, 2009, 2010, 2013, 2014). Annual Conference Abstract Reviewer, National Council on Family Relations Annual Conference.

(2009, October), Briefing on Community Capacity and Resilient Military Members, Veterans, and their families delivered to the Citizen Soldier Support Program National Advisory Council at the Rizzo Center in Chapel Hill, NC. Attendees included MG (Ret) Rudi Rudisill, LTG (Ret) (Advisory Council Chair), Tom Plewes, Kimrey Rinehart, Tanna Schmidli (NMFA), Howard Lee, Neil Caudle, and Tony Waldrop.

(2009, July), Three-hour briefing to Lieutenant General Dennis J. Hejlik (Commanding General, II Marine Expeditionary Force), MC commanders and Family Readiness Officers (FROs) in II MEF (Camp Lejeune, NC); to MC commanders and FROs in I MEF (Camp Pendleton, CA); to the Senior Commander, Ms. Tracy McLaughlin, Bruce Barnes, and HQ Family Readiness Officers and Family Team Building Staff in Marine Forces Reserve (MARFORRES, New Orleans, LA); and to Lieutenant General Keith Stalder (Commander, USMC Forces Pacific), Lieutenant General Richard Zilmer (Commanding General, III Marine Expeditionary Force, MC Bases, Japan), MC Commanders, and FROs in III MEF (Camp Butler, Okinawa, Japan).

(2009, March), Demonstrated the Building Corps Families Readiness Assessment Tools (the Units Assets Inventory and the Spouse Assets Inventory) to the Family Readiness Committee (FRC), Marine Corps Community Services Board of Directors, at Marine Corps Base Quantico, Virginia. Lieutenant General Dennis J. Hejlik, Commanding General of the 2<sup>nd</sup> Marine Expeditionary Force, is chair of the Board. The Corps' first lady, Mrs. Annette Conway, spouse of the 34<sup>th</sup> Commandant of the Marine Corps, Gen. James T. Conway, is also on the Board.

(2009, February), School of Social Work Dean Richman and Kenan Distinguished Professor Gary Bowen gave a presentation on February 25 to members of the Governor's Focus on Returning Combat Veterans and Their Families at Dorothea Dix Hospital in Raleigh, NC. The group promotes best practices in the service of veterans who served in the global war on terrorism and their families. The School of Social Work and the Behavioral Healthcare Resource Program are among the state's partners working with the Governor's Focus to develop a referral network that will connect North Carolina residents and their families to services they need post-deployment.

(2009-present), Member, The Homeless Veterans Task Group, The Governor's Focus on Returning Combat Veterans and their Families. Chair: The Honorable Grier Martin, NC House of Representatives.

(2008, October), Plenary address, 2008 California Association of School Social Workers Annual Conference, Oakland, CA, "The School Success Profile (SSP): The Science and Practice of School-Based Interventions."

(2008, October). Keynote address, 2008 Building Strong Families Conference, Responding to Families in Trauma, Mid-Atlantic Council on Family Relations, Messiah College, PA, "Military Family Resiliency and Community Capacity Building in the Shadows of War: Implications for Policy and Practice."

(2008, September). Invited guest lecture, School of Human Environmental Sciences, The University of North Carolina at Greensboro, "Conceptualizing Social Problems to Inform Assessment and Intervention Planning: Case Examples."

(2008 - 2009). Member, Veterans' Affairs Task Force, The Council on Social Work Education (CSWE). (Co-Chair with Dr. Billie Terrell, Research and Education)

(2007-2010). External Consultant and School Success Profile Trainer, Dr. Maria Roth, Professor, Babes-Bolyai University, Department of Social Work, Cluj, Romania.

(2008). External Reviewer, Tenure Review, Graduate School of Social Service, Fordham University.

(2007). Invited Consultant, School Social Work Survey Expert Panel, National School Social Work Survey Team (Michael Kelly, Stephanie Berzin, Andy Frey, Michelle Alvarez, and Gary Shaffer).

(2007). External Consultant, Citizen-Soldier Support Program, Odum Institute for Research in Social Science, The University of North Carolina at Chapel Hill.

(2007). External Reviewer, Tenure and Promotion Review, School of Social Welfare, University of California, Berkeley.

(2006). Survey Consultant, Personal Readiness Assessment, Airman, Family, & Community Operations Branch (HQ AFPC/DPFFF), San Antonio, TX. (Major David L. Bringham, Ph.D.)

(2006). External Review, Full Professor Promotion Review, Department of Human Development, Virginia Polytechnic and State University.

(2005 - 2006). Advisory Board, Phase II of the Department of Defense-funded project, "Our Strength in Families (OSiF): A Web-based Interactive Coping Skill and Resiliency Program for Military Families (Contract W81XWH-05-C-0021), Dr. Emil Chiauzzi (PI), Inflexxion, Inc., Newton, MA, and Dan and Linda King, VA Boston Healthcare System.

(2005 - 2006). Presenter, School Success Profile to The Chinese Delegation, which is comprised of 25-high rank officials of the National Population and Family Planning Commission. The main purpose of the visit was to receive training on “Population, Health Service and Harmonious Society.”

(2005 - 2009). Consultant, Airman and Family Readiness Flight (AF/A1DFF), Washington, DC: United States Air Force.

(2005). External Review, Tenure and Promotion Review, College of Social Work, University of Kentucky.

(2005). External Review, Tenure and Promotion Review, School of Social Work, University of Louisville.

(2005). Training workshop on the School Success Profile conducted with 25 senior officials of the National Population and Family Planning Commission of China, School of Social Work, The University of North Carolina at Chapel Hill. (with Natasha Bowen)

(2005 - present). Member, Distinguished Research Council, America’s Promise: The Alliance for Youth, Alexandria, VA.

(2004). External Reviewer, Tenure and Promotion Review, Department of Human Development, Virginia Polytechnic and State University.

(2004). External Reviewer, Tenure and Promotion Review, School of Social Service Administration, The University of Chicago.

(2004). Congressional Briefing on Capitol Hill, G50 Dirksen Senate Office Building, “Military Families: Developing and Sustaining Resilience.” Briefers: Gary L. Bowen, Jay A. Mancini, James A. Martin, Dennis K. Orthner, Deborah Levin.

(2004, 2005, 2006). Reuben Hill Award Committee, National Council on Family Relations. (2004 Chair: Marilyn Coleman; 2005 Chair: Shelley MacDermid)

(2003). External Reviewer, Full Professor Review, Department of Family Studies, University of Maryland at College Park.

(2003 - 2010). Board Member, National Learning Institute, Fairfax, VA.

(2003). External Reviewer, Promotion and Tenure Review, School of Social Work, Rutgers, State University of New Jersey.

(2003). External Reviewer, Promotion and Tenure Review, School of Social Work, University of Illinois at Urbana-Champaign.

(2003). Invited Consultation on Schools as Learning Organizations, Paris, France.

(2002). Invited Presentation/Consultation, Communities In Schools of Philadelphia.

- (2002). Invited Colloquium, "Evaluating the Effectiveness of the School Success Profile (SSP) on School- and Student-Level Performance,' Bryn Mawr College, School of Social Work, Bryn Mawr, Pennsylvania.
- (2002). External Reviewer, Promotion and Tenure Review, University of California, Berkeley.
- (2002). Invited Consultant, National Institute on Drug Abuse (NIDA), Design of an evaluation of the Parent Corps. Chapel Hill, NC.
- (2001 - 2008). Program Faculty Member, Education Policy Research Training Program, Duke University and The University of North Carolina at Chapel Hill. (Funded by the Spencer Foundation).
- (2001). Research Consultant, Dr. Christian Smith, Department of Sociology, The University of North Carolina at Chapel Hill, Methodological Issues and Challenges in the Study of American Youth and Religion.
- (2001). Consultant, United Way of Central Georgia. With funding from the Knight Foundation, designed and conducted a one-day community dialogue with 80 residents of Milledgeville, Georgia, on Youth Development and Community Readiness.
- (2001). External Reviewer, Promotion and Tenure Review, Boston University.
- (2001). Visiting Scholar, Department of Human Development, Virginia Polytechnic & State University, Blacksburg, VA.
- (2000, 2001, 2002, 2003) Invited Member, Rosabeth Moss Kanter Award Committee for Excellence in Research on Work and Family. (Chair: Professor Shelley M. MacDermid, Purdue University)
- (1999). Co-Chair, School Based Interventions, Binational Israel-North Carolina Workshop on the topic of Violence, Trauma & Community Stress Prevention and Evaluation and Learning Strategies with Multi-Problem Youth, JDC-Brookdale Institute of Gerontology and Human Development, Jerusalem, Israel.
- (1999). Expert Testimony, "Students In Peril: Crime and Violence in Schools," Governor Jim Hunt's Task Force on School Violence, Raleigh, NC. (Chair: Richard Moore, Crime Control Secretary)
- (1999). Invited Guest, Experts Forum, Family ReUnion VI: Families and Community. (Chair: Vice President Al Gore, Nashville, Tennessee)
- (1999). Research Proposal Review, Israeli Science Foundation.
- (1999). Invited Member, Tenure Review Committee for Promotion of Candidate to Senior Lecturer, Department of Social Work, Hebrew University.
- (1998 - 2004). Senior Social Work Consultant, Social Work Advisory Group, Family Advocacy Division, AFMOA, United States Air Force, San Antonio, TX. (Chair: Colonel John P. Nelson)
- (1998 - 1999). Expert Panel and Consultant to Dr. Carolyn M. Cooper on Expert Panel on Quality of Military Life, U.S. General Accounting Office (GAO), National Security and International Affairs Division, on review of the relationship between military quality of life and retention, Washington, DC.

(1997 - 2004). Consultant, Office of the Surgeon General, Family Advocacy Division, United States Air Force, San Antonio, TX.

(1997 - 2001). Consultant, Air Mobility Command Family Matters (HQ AMC/DPPHF), Scott AFB, IL.

(1997). Invited member, Awards Committee for New Contribution Award, International Society for the Study of Personal Relationships (ISSPR). (Chair: Leanne Lamke, Auburn University)

(1997). Member, Mental Health Technical Advisory Board, Department of the Air Force, Office for Prevention and Health Services Assessment (OPHSA), Brooks AFB, TX.

(1997). Invited Guest, Experts Forum, Family ReUnion VI: Families and Learning. (Chair: Vice President Al Gore, Nashville, Tennessee)

(1996 - 1997). Consultant, Office of Family Policy Support and Services, Child Development and Youth, Office of the Secretary of Defense, Personnel and Readiness, Arlington, VA.

(1996). Invited Support Researcher, DoD Quality of Life Research Symposium, Georgetown University, Washington, DC.

(1996). Co-Chair with Dr. Jack Richman in sponsoring the 1996 Family Council of North Carolina Annual Conference, "Strengthening North Carolina Families," Chapel Hill, NC.

(1996). Invited Guest, Experts Forum, Family ReUnion V: Family and Work. (Chair: Vice President Al Gore, Nashville, Tennessee)

(1996). Invited presenter, Institute for the Advancement of Social Work Research, Meeting with Graduate Schools of Social Work in the Southern California area, San Diego, CA. (Chairs: Kathy Ell and Jim Martin)

(1996). Co-Chair with Bernie Hyman in sponsoring the 1996 Family Council of North Carolina Annual Conference, "Fathering and Responsibility," Chapel Hill, NC.

(1995). Invited Participant, Drafting a Social Work Response to the Department of Defense's Women's Health Initiative, Institute for the Advancement of Social Work Research (IASWR). (Chair: Jim Martin)

(1994). Invited Member, Tenure Review Committee for Promotion of Candidate to Full Professor, Department of Sociology, University of Indiana at Indianapolis.

(1994, June 23). Congressional Testimony on Family Advocacy Program, Mr. David H. Morrison, Professional Staff Member, Subcommittee on Defense, Senate Committee on Appropriations. Invited by Office of the Under Secretary of Defense, Pentagon, Washington, DC.

(1994). Invited Professor, Department of Human Development and Family Relations, The University of North Carolina at Greensboro.

(1994 - 1996). Guest Consultant, Military Family Institute, Marywood College, Scranton, Pennsylvania.

(1993). Invited Member, Tenure Review Committee, Department of Family and Child Development, Virginia Polytechnic Institute and State University, Blacksburg, VA.

(1993). Invited Expert Testimony, Office of the Assistant Secretary of Defense For Management and Personal, Pentagon, Washington, DC, on the Study of Family Status and the Initial Term of Service. (Chair: Gail McGinn)

(1993). Guest Lecturer, Virginia Polytechnic Institute and State University, School of Human Resources, Department of Family and Child Development, Blacksburg, VA.

(1993 - 1997). Research and Program Consultant, U.S. Army, Community and Family Support Center (CFSC), U.S. Army, Alexandria, VA.

(1992 - 1993). Relocation Consultant, United States Air Force, Office of Family Matters, Washington, DC.

(1992). Proposal Reviewer, Interdisciplinary Grant Competition, College of Human Ecology, The Ohio State University, Columbus, OH.

(1992). Invited Guest, University of Maine Cooperative Extension, Orono, ME.

(1992). Conference Co-Chair with Dennis K. Orthner, Military Family Research Planning Conference, Chapel Hill, NC. Eighteen policy and research leaders from the Department of the Defense, Department of the Army, Department of the Navy, Department of the Air Force and the U.S. Coast Guard participated in a two-day conference to chart a family research agenda for the 1990s. Topics discussed included a decade review of military family research, trends and issues facing military families in the next decade, state of knowledge on priority military family issues, and development of a priority research agenda.

(1992). External Reviewer, Caliber Associates, Development of an Evaluation for Employer-Supported Child Care Programs (Grant No. E-9-4-1-0070) for U.S. Department of Labor.

(1992). Panel Member, National Defense Science and Engineering Graduate Fellowship Program, Cognitive, Neural and Behavior Panel, Administered by Battelle, Research Triangle Park, for the Department of Defense. (Other Panelists: Gary Hull, Richard Labarba, Barbara Quigley, Catherine Riordan, & Mary Zalesny).

(1992). Consultant, Family Consequences from Downsizing. Pope Air Force Base, NC.

(1992, January 15). Guest Appearance, Family Works, WLFL-TV, Raleigh, NC. Interviewed by Gayle D. Hurd, Public Affairs Director.

(1992). Consultant, Department of Defense Panel on the Effects of Military Relocation. (Chair: LtCol John Nelson)

(1992, January 4). Guest Appearance, 22 Minutes, WLFL-TV, Raleigh, NC, Topic: Families in Current Perspective, Interviewed by Gayle D. Hurd, Public Affairs Director.

(1991). Invited Participant. Rural Sociological Society's Working Group on Poverty. (Chair: Dr. Pat Garrett).

(1991). Invited presenter with Richard Clifford, Deborah R. Cryer, & Dennis K. Orthner, "Strategies to pay the cost of adequate salary and compensation for teachers-caregivers employed in child day care

centers,” Ad Hoc Committee on Child Care Worker Compensation. (Chair: Nancy M. Sampson, North Carolina Department of Human Resources)

(1991). Invited Member, Tenure Review Committee, School of Social Work, Virginia Commonwealth University, Richmond, VA.

(1991). External Reviewer. Minority Institutions Research Development Program, National Institute of Mental Health, Alcohol, Drug Abuse and Mental Health Administration, Department of Health and Human Services, Rockville, MD. (Chair: Lawrence Chaitkin, Ph.D.)

(1991 - 2000). Evaluation Consultant, Communities In School, Charlotte, NC.

(1991 - 1992). Invited Member, North Carolina Advisory Board of the Early Education and Care Leadership Development Project. (Chair: Dr. Donald Stedman, Dean, UNC-CH School of Education)

(1991). Invited Panel Member, The North Carolina Democratic Leadership Council, Saving the American Family. Organized by Congressman David Price, Chairman of the NC DLC. (Other Panelists: Elaine Kamarck, Senior Fellow at the Progressive Policy Institute, Washington, DC; and Sandy Babb, Executive Director of NC Equity)

(1991). Panel Member, National Defense Science and Engineering Graduate Fellowship Program, Cognitive, Neural and Behavior Panel, Administered by Battelle, Research Triangle Park, for the Department of Defense. (Other Panelists: Joyce Hogan, Robert Hogan, Gary Hull, & Robert Shaw)

(1991 - 1992). Research and Technical Consultant. Children's Learning Centers. Amarillo, TX.

(1991). Educational Consultant, Military Lifestyle Magazine, “Fathers in the Military” by Nancy Bolick, Author.

(1990). Invited Seminar Leader, Symposium for Select Populations—Homeless, Migrant Workers, New Immigrants, and Urban Elderly. Organized by H. Douglas Sessoms and Dennis K. Orthner through grants from the James Foundation and Leroy Springs Foundation.

(1990). Panel Member, National Defense Science and Engineering Graduate Fellowship Program, Cognitive, Neural and Behavior Panel, Administered by Battelle, Research Triangle Park, for the Department of Defense. (Other Panelists: R.D. Avery, T.L. Dickinson, C.A. Riordan, R.E. Shaw, L.A. Walker)

(1989). Needs Assessment Consultant, Ad Hoc Committee on Anti-Poverty, Greater Durham Chamber of Commerce, Durham, NC.

(1989). Guest Appearance, Assignment Sunday, WRAL-TV5, Raleigh, NC, Topic: Families and Crisis, Interviewed by Waltye Rasulala, Public Affairs Director.

(1988 - 1989). Blue Ribbon Panel Consultant, Family Support Center Review Panel, Department of the Air Force, Family Matters Branch, Pentagon, Washington, DC.

(1987 - 1988). Management Consultant, Wiring and Cable Division, E.I. Dupont, Wilmington, DE.

(1986 - 1988). Program Consultant, Family Programs Branch, Headquarters, U.S. Marine Corps, Washington, DC.

(1986 - 1988). Invited Member, Tenure Review Committee, Department of Family and Child Development, Virginia Polytechnic and State University, Blacksburg, VA.

(1986 - 1989). Chairperson, Transcultural Family Committee, Office of Air Force Family Matters, Department of the Air Force, Washington, DC.

(1986). Evaluation Consultant, Model Volunteer Demonstration Project, Office of Family Matters, Department of the Air Force, Washington, DC.

(1986). Invited guest of General Telephone, Durham, North Carolina to provide technical consultation to department heads and human resource managers on employee assistance programs. Presented a paper entitled, "Corporate Supports for Employees and their Families: Rationale and Strategies."

(1986). Guest Appearance, Far East Television Network, Tokyo, Japan. Completed a 45-minute interview about the nature of family life in the U.S. Military. Aired on U.S. bases in Hawaii, Japan, Korea, Philippines, and Guam.

(1985 - 1989). Research and Technical Consultant to the Research Triangle Institute, Research Triangle Park, NC.

(1985). Research Associate, Institute for Research in Social Science, University of North Carolina at Chapel Hill.

(1985 - 1986). Panel Member, "Plan for Research on Army Families," Battelle Columbus Laboratories, Research Triangle Park, North Carolina (Contract through the U.S. Army Research Institute for the Behavioral and Social Sciences). One of five experts selected nationally to participate on this panel.

(1985). Panel Member, "Framework for Research on Career Decision Making and the Military Family," Battelle Columbus Laboratories, Research Triangle Park, North Carolina (Contract through the U.S. Army Research Institute for the Behavioral and Social Sciences). One of five experts selected nationally to participate on this panel.

(1985). Invited Participant, Surgeon's General Workshop on Domestic Violence and Public Health, Leesburg, Virginia. Participated in the general workshop and a special task force on spouse abuse prevention, which was chaired by Evan Stark and Ann Flitcraft. One of two participants invited from the State of North Carolina.

(1985). Invited Participant, Families in Transition: A Symposium Exploring Public and Private Policies that Affect Family Stability at Home and Employee Productivity at Work. Sponsored by the U.S. Caucus on the Family. [Chairs: Senator Jeremiah Denton (R-AL) and Senator DeConcini (D-AZ)]

(1985). Co-Director of Family Ministries, Messiah United Methodist Church, Springfield, VA. (2000+ members)

(1984). Guest Reviewer, Family Relations Special Issue on Single Parent Families.

(1983 - 1985). Research and Technical Consultant, Family and Youth Services Bureau, Administration for Children, Youth, and Families, Department of Health and Human Services, Washington, DC (Mr. Jerry Regier, Commissioner)

(1984 - 1985). Research and Technical Consultant, U.S. Army Research Institute for the Behavioral and Social Sciences, Department of the Army, Alexandria, VA.

(1983). Technical Consultant, Resource Consultants, Inc., McLean, VA.

(1984). Technical Consultant, Pacific News Service, "Domestic Violence in the U.S. Military," by Mr. John Ross, Editor.

(1982 - 1983). Research Consultant, Office of Naval Research, Department of the Navy, Arlington, VA.

(1984). Educational Consultant, Ladycom, "Commanders' Wives" by Sheila J. Gibbons, Editor.

(1982 - 1984). Program Consultant, Family Support Branch, United States Navy, Washington, DC.

(1982). Program Consultant, Family Activities Branch, United States Air Force, San Antonio, TX.

(1981 - 1984). Research Consultant, United States Air Force Chief of Chaplains, Washington, DC.

(1981 - present). Research and Program Consultant, United States Air Force Office of Family Matters, Washington, DC.

(1981 - 1982). Advisory Committee, Women in the Army Policy Review Group (DAPE-ZAW), Washington, DC.

(1981 - 1982). Training Consultant, Family Renewal Center, Fairview Hospital, Minneapolis, MN.

(1976 - 1979). Clinical Consultant, Wilkes County School System, Wilkes County, NC.

(1976 - 1979). Program Consultant, Boys Town Group Home, Department of Social Services, Wilkes County, NC.

(1976 - 1979). Program Consultant, Girls Town Group Home, Department of Social Services, Wilkes County, NC.

(1976 - 1979). Clinical Consultant, Foster Care Program, Department of Social Services, Wilkes County, NC.

(1976). Clinical Consultant, Wilkes County Vocational Workshop, Wilkes County, NC.

## **CONTRIBUTIONS: THE UNIVERSITY OF NORTH CAROLINA**

### **University Appointments**

Alternate Member, Behavioral Institutional Review Board (2002-2008).

Member, Academic Affairs Institutional Review Board (1996-2002).

Member, Seminar on the Family as a Bridge Between Society and the Individual: Comparative and Cross-Disciplinary Perspectives (1991-1995), Appointed by Chancellor Paul Hardin.

Member, Administrative Board of the Graduate School (1992-1995), Appointed by Chancellor Paul Hardin.

### **University Service: Elected Positions**

Member, Committee on Appointments, Promotions, and Tenure: Professional Schools other than Medicine (2009-2012)

Member, Faculty Council (1998-2001)

### **Major Administrative Positions in the School of Social Work**

Chair: Direct Practice Concentration (2000-2003)

Co-Chair: Doctoral Program (1991-1994)

Chair and Co-Chair: Doctoral Program Planning Committee (1988-91)

Chair: Family and Children's Specialization (1987-2008)

Co-Chair: Family and Children's Specialization (1986)

### **Proportion of Appointment Allocated for Administration**

1994-95	40%
1993-94:	40%
1992-93:	40%
1991-92:	40%
1990-91:	40%
1989-90:	25%
1988-89:	25%
1987-88:	25%

### **Graduate Courses Taught**

SOWO 102: Introduction to Research Methodology

SOWO 202: Analysis and Presentation of Data

SOWO 220: Social Work Practicum 1

SOWO 220: Practicum Seminar

SOWO 222: Social Work Practicum 2

SOWO 222: Social Work Practicum 3

SOWO 223: Social Work Practicum 4

SOWO 233: Family Stress, Coping, and Social Support

SOWO 292: Evaluation of Practice

SOWO 300: Essay

SOWO 311: Seminar in Social Policy

SOWO 313: Advanced Research Methods in Social Intervention (Doctoral Course)<sup>1</sup>

SOWO 315: Social Work Research 1

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<sup>1</sup> Designed by Gary L. Bowen and Anne-Linda Furstenberg (1994).

SOWO 315: Evaluation of Practice  
 SOWO 386: Models of Family Functioning and Interaction  
 SOWO 709: Military Members, Veterans, and their Families  
 SOWO 799: Interventions with Organizations and Communities  
 SOWO 802: Family Stress, Coping and Social Support  
 SOWO 810: Evaluation of Social Work Interventions  
 SOWO 842: Families: Theory and Practice  
 SOWO 875: Communities: Theory and Practice  
 SOWO 900: Conceptualizing Social Problems to Inform Interventions (Doctoral Course)<sup>2</sup>  
 SOWO 994: Dissertation

### **Committee Work in the University**

- (2011). Appointed Member, Performance Review Committee for Jack Richman as Dean of the UNC School of Social Work, Chair: Gary Marchionini, Dean of the UNC School of Information and Library Science. Appointment: Bruce W. Carney, Executive Vice Chancellor and Provost.
- (2009-2013). Elected Member, Committee on Appointments, Promotion, and Tenure, Office of the Provost.
- (2008- present). Invited Member, Steering Committee, UNC-CH Galapagos Initiative. Organizer: Professor Steve Walsh, Department of Geography & Carolina Population Center.
- (2008-2009). Appointed Member, Distinguished Chairs Search Committee, Chair: Professor Barbara Wasik. (Appointment: Bernadette Gray-Little, Executive Vice Chancellor and Provost).
- (2003). Appointed Member, Distinguished Chairs Search Committee, Chair: Professor Howard Aldrich. (Appointment: Robert N. Shelton, Executive Vice Chancellor and Provost).
- (2001-2002). Appointed Member, Search Committee for Dean, School of Social Work, Chair: Professor Linda Cronenwett, Dean, School of Nursing. (Appointment: Dr. Jack Richman).
- (1997-2001). Board Member, Research Triangle Professional Development Schools Partnership (RTPDSP), School of Education.
- (1994-96). Co-Covenor with Dr. Glen Elder, Family Study Group, Supported by the Massey-Weatherspoon Fund, The University of North Carolina at Chapel Hill.
- (1995). Planning Committee, The Charles and Shirley Weiss Symposium on Urban Livability, “War and Urban Society in the South: Problems and Opportunities of the Great Demobilization.” (Chair: Roger Lotchin).
- (1993). Appointed Member, Divisional Nominating Committee, Division of the School of Social Work, Faculty Council.
- (1992-95). Appointed Member by Dean of the Graduate School, Steering Committee for the Weiss Urban Livability Gift.

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<sup>2</sup> Designed by Gary L. Bowen (2006).

(1992-93). Member, Educational Policy Subcommittee, Administrative Board of the Graduate School.

(1992). Member, Special Subcommittee, Graduate Students Teaching Other Graduate Students, Administrative Board of the Graduate School.

(1991-1992). Appointed Member, Search Committee for Dean, School of Social Work, Chair: Frank A. Loda, M.D. (Appointment: Dr. Richard Edwards)

### **Committee Work in the School of Social Work**

(2014-present), Doctoral Committee.

(2015-present), Faculty Activity Review Committee.

(2013-2016), Chair, Personnel and Promotion Committee.

(2013-2014), Co-Chair with Gary Nelson, Revision of SSW Bylaws.  
(Revised Bylaws for School of Social Work)

(2012-2014), Appointed Member, Committee on Students.

(2012-2013), Co-Chair, Personnel and Promotion Committee.

(2012-2013), Co-Chair with Gary Nelson, Personnel Guidelines Review Committee (2012-2013).  
Revised Promotion and Tenure Policy for School of Social Work.

(2009-2010), Chair, Search Committee, L. Richardson Preyer Distinguished Professorship.  
(Appointment: Dr. Michael Lambert, Full Professor)

(2008-2010). Co-Chair with Matthew Howard, Curriculum Committee.

(2008). Search Committee, Clinical Faculty Position, UNC-Chapel Hill Child Welfare Education Collaborative. (Chair: Wanda F. Reives)

(2007-2009). Tenured Faculty (Full Professor) Representative, Personnel Promotion and Tenure Committee.

(2004-2008). Family & Children's Representative, Direct Practice Concentration Committee.

(2004-present). Institutional Review Board (IRB), Local SSW Review Committee.

(2006-2007). Chair, Search Committee, The Frank A. Daniels Distinguished Professorship for Human Services Policy Information. (Appointment: Dr. Matthew Howard)

(2006-2007). Co-Chair, Advanced Curriculum Investment Team with Anna Scheyett.

(2005-2007). Elected Member, Curriculum Committee.

(2005-2006). Chair, Search Committee, Smith P. Theimann, Jr. Distinguished Professor for Ethics and Professional Practice. (Appointment: Dr. Kim Strom-Gottfried)

- (2005-2006). Member, Search Committee, Assistant Professor. (Appointment: Dr. Betsy Bledsoe)
- (2004-2005). Member, Search Committee, Assistant Professor. (Appointment: Dr. Michal Greenstein-Weiss)
- (2004-2005). Appointed Member, Task Force to Evaluate Existing Part-Time Programs.
- (2004-2005). Chair, Faculty Oversight Committee, Parent-Teen Biculturalism Project, U.S. Centers for Disease Control and Prevention, Dr. Mimi Chapman, PI.
- (2002-2003). Chair, Search Committee, Assistant/Associate Professor. (Appointment: Dr. Susan Parish)
- (2000-2001). Appointed Member, Strategic Planning Committee, Norelli & Company.
- (1999-2004). Chair, Mentoring Committee, Dr. Paul Smokowski.
- (1999). Chair, Internal Search Committee, Berg-Beach Distinguished Professorship for Community Social Work. (Appointment: Dr. Marie Weil)
- (1999-2001). Elected Member, Steering Committee.
- (1998-2000). MSW Admission Committee.
- (1997-1998). Search Committee, Associate Dean. (Appointment: Dr. Kim Strom-Gottfried)
- (1997-1999). Elected Member, Personnel Committee.
- (1997). Chair, Committee to develop delayed entry practice curriculum plan.
- (1993). Appointed Member, Work Group to Consider Structure for Externally Funded Activities Committee. (Chair: Dr. Dennis K. Orthner)
- (1992-1993). Chair, Search Committee for the John A. Tate, Jr., Distinguished Professorship for Services to Children in Need. (Appointment: Dr. Mark Fraser)
- (1989-1992). Member, Family Learning Center Task Force. (Chair: Dean John B. Turner)
- (1987-1991). Member, Educational Administrative Committee. (Chair: Dean John B. Turner)
- (1985-1999). Appointed Member, Faculty Representative, UNC-CH School of Social Work Board of Advisors. (Chair: John A. Tate)
- (1988-1989). Appointed Member, The Human Services Research and Design Laboratory Task Force. (Chair: Dr. Gary Nelson)
- (1985-1987). Elected Member, Travel Committee.
- (1987-1991). Co-Chair: Doctoral Planning Committee.

(1987-1991). Co-Chair: Doctoral Task Force.

(1989). Review Panel. 1989 Recognition of County DSS Excellence and Innovation, Sponsored by the State Division of Social Services, the Association of County Directors of Social Services, and the UNC-CH School of Social Work. (Appointment: Dean John B. Turner)

(1987-1988). Chair, Search Committee for Faculty Member for F & C Specialization. (Appointment: Dr. Jack Richman)

(1987-1988). Appointed Member, Search Committee for Research Faculty Member. (Chair: Dr. Gary Nelson)

(1987-1988). Appointed Member, Long-Range Planning Sub-Committee on Research, Board of Advisors, School of Social Work. (Chair: Mr. Charles Dunn)

(1987). Appointed Member, Hank Hollingsworth Fund Committee. (Chair: Dr. Maeda Galinsky)

(1987-1988). Appointed Member, Research Essay Committee. (Chair: Dr. Phil Cooke)

(1985-1987). Appointed Member, Advisory Committee for Technical Assistance and Continuing Education. (Chair: Dr. Phil Cooke)

(1985-1986). Member, Comprehensive Examination Committees for HBSE and Research.

(1985-1986). Appointed Member, Search Committee for Research Position. (Chair: Dr. Maeda Galinsky)

### **Selective Local Community Service and Academic Activities**

(2013, April). Member, Review Panel, Carrboro High School PTSA Scholarship Committee (Roland Smith: Chair). Interviewed 22 high school seniors to award ten scholarships of \$1,000.00.

(2009, October). Member of Panel Discussion (Social Work and the Military), School of Social Work Board of Advisors Meeting, Extraordinary Ventures, Chapel Hill, NC, with Mark Fraser, Bob Goodale, Susan Furman, MSW Student, Liz Marks, MSW Student, and Monisha Sanabria, MSW Student.

(2005, November). Presentation at Methods & Analysis Research Seminar (MARS), School of Social Work, The University of North Carolina at Chapel Hill, "Quasi-Experimental Strategies When Randomization is Not Feasible: Evaluation Challenges and Political Realities." (with Roderick A. Rose & Shenyang Guo)

(1996-2004). Not recorded on CV.

(1995). Invited Workshop Leader, Orange County Youth Services Advisory Commission, "Results-Oriented Evaluation." (invited by Sara Wilbur, Vice Chair)

(1995). As President of Family council of North Carolina developed a conference on Fathering and Responsibility that was attended by more than 100 professionals.

- (1995). Invited Colloquium Leader, Carolina Seminars Family Group, The University of North Carolina at Chapel Hill, "Contextual Effects." (with Peter M. Blau).
- (1994). Invited Lecturer, Psychology 24, Child Development, Department of Psychology, The University of North Carolina at Chapel Hill, "Family Influences on Child Development."
- (1993). Invited Speaker, Principal's Executive Program, The University of North Carolina at Chapel Hill, "Student Success and Family Involvement."
- (1993). Co-Chair, Orange County Communities-In-Schools Community Assessment Committee. (with Marti Pryor-Cook).
- (1993). Member, Orange County Communities-In-Schools Steering Committee and Implementation Task Force.
- (1992). Invited Speaker, Dean's Seminar, School of Social Work, The University of North Carolina at Chapel Hill, "Cities in School: Toward an Evaluation Design." (with Jack Richman)
- (1992). Invited Speaker, Carolina Consortium on Human Development, Proseminar on Parenting and Development in Perspective, The University of North Carolina at Chapel Hill, "Parents in Two Worlds: The Family and the Military." (with Dennis K. Orthner)
- (1992). Invited Colloquium Leader, Carolina Seminars Family Group, The University of North Carolina at Chapel Hill, "Families, Work and Interdependency." (with Dennis K. Orthner)
- (1989). Invited Speaker, North Carolina Society of Clinical Social Workers, Chapel Hill, NC, "Doctoral Education in Social Work: Trends and Issues."
- (1988). Plenary Speaker and Workshop Leader, Stress and the Family Conference, Charlotte, NC.
- (1987). Invited Colloquium Speaker, Institute of Research for the Social Sciences (IRSS), The University of North Carolina at Chapel Hill, "Work and Family Linkages in the U.S. Military."
- (1987). Workshop Presenter, Plenary Session, "How Families Handle Stress and Crisis;" Workshop, "Marital Stability and Dissolution." Presented at the workshop entitled, Crisis Affecting Family Mental Health: Assessment and Intervention, and sponsored by the Area Health Education Center (AHEC) in affiliation with The UNC-CH School of Social Work, Fayetteville, NC.
- (1987). Invited Colloquium Speaker, Department of Psychology, The University of North Carolina, "Defining Family Strength: The Congruency between Family Values and Behavior."
- (1986). Invited Presentation to the Division of Psychiatric Social Work Services, Duke University Medical Center and Veterans Hospital, Durham, NC on the nature and status of human service-oriented research in the military community.
- (1986). Presentation to Pediatric Social Work Staff, NC Memorial Hospital, Chapel Hill, NC, on issues concerning working with children from military families.
- (1986). Evaluation Consultant, Adolescent Parenting Program, Chapel Hill, NC (Program Coordinator: Kathy Pullman)

(1985-1986). Committee Member and Needs Assessment Consultant, Needs Report Committee of the Human Services Advisory Commission, Orange County, NC. (Chair: Peggy Pollitzer)

(1986). Needs Assessment Consultant, Adolescent Day Treatment Program, Orange, County, Pearson, Chatham County Mental Health Center, Chapel Hill, NC. (Administrator: Mike Smith)

(1985-1986). Committee Member, Information/Referral Steering Committee, Orange County, NC. (Chair: Verla Insko, Orange County Commission for Women)

(1986). Monitor and Moderator, Seventy Annual Black Experience Workshop, School of Social Work, UNC-CH. (Chair: Dr. Audrey E. Johnson)

### **Student Research Supervision**

#### UNC Department of Allied Health Sciences (Occupational Science)

Freuler, Ashley C. (2013). *Facing challenges on two fronts: Exploring the process of resilience for military families raising a child with Autism*. Dissertation Committee Member.

Chair: Dr. Grace T. Baranek

Doctoral Comprehensive Exam Committee (2011-2013)

#### UNC Department of Communication Studies

Cronin, Jennifer Lynne (2013). *Speaking the unspeakable: Adult children's revelations of unwed pregnancy to parents*. Dissertation Committee Member. (Chair: Dr. Lawrence B. Rosenfeld)

Doctoral Comprehensive Committee (2010-2013)

Muelhoff, T. (2004). *Embodied perspective-taking*. Dissertation Committee Member.

Chair: Dr. Julia T. Wood

Doctoral Comprehensive Exam Committee (2002-2003)

#### UNC School of Nursing

Meg Zomorodi (2006 -2008). Research Mentor and Consultant, "Interventions to Prevent and Manage Chronic Illness,"

Hsiao, Chiu-Yueh (2005-2007). Doctoral Comprehensive and Dissertation Committee Member.

Weiss, K. (2004-2006). Doctoral Comprehensive and Dissertation Committee Member.

Van Horn, E. (2003-2004). Doctoral Comprehensive Committee Member.

#### UNC Department of Psychology

Armer, E. G. (2005). *Parents' partner-knowledge related to coparenting: An examination of a new component of coparenting in stepfamilies*. Ph.D. Dissertation Committee Member.

Chair: Professor Andrea Hussong

Doctoral Comprehensive Exam Committee (2002-2005)

UNC Department of Sociology

Gimble, C. (1992). *Recollections of wartime experience: Do forty years make a difference?* Ph.D.  
 Dissertation Committee Member.  
 Chair: Professor Glen Elder

School of Social Work, The University of North Carolina at Chapel Hill: Dissertation Chair

Todd M. Jensen (Anticipated graduation date: May 2017).

Christopher Wretman (Anticipated graduate date: May 2017).

Weller, Bridget E. (2009). *Community Capacity and Behavior Problems among Adolescents: A Contextual Effects Study Using Multilevel Logistic Regression*.  
 2010 Outstanding Doctoral Student Award from UNC School of Social Work (Co-winner)  
 Doctoral Advisor (2003-2009)  
 Positions since graduation: (1) Post Doc, Duke University, 2009-2013, Received a Medical Center Instructor/Post-doctoral Fellow position through Duke University and The Child and Family Study Center. She will serve as the project coordinator for the NIMH funded project entitled Impact of Adolescent Suicide Attempts on Parents. Under the mentorship of David B. Goldston, Ph.D., she will conduct longitudinal research, administer clinical research interviews, and produce publications.

Woolley, Michael E. (2003). *Assessing the Validity of Self-Report Items for Children: The Inter-Rater Reliability of Cognitive Pretesting*. (Dissertation with Distinction)  
 2003 Outstanding Doctoral Student Award from UNC School of Social Work  
 Ph.D. Research Practicum, The University of North Carolina at Chapel Hill, School of Social Work; Doctoral Advisor (2000-2003).  
 Positions since graduation: (1) Assistant Professor, Schools of Social Work and Education, University of Michigan (2002-2005), (2) Assistant Professor, School of Social Service Administration, University of Chicago (2006-2010), (3) Associate Professor, School of Social Work, University of Maryland at Baltimore.

Loflin, Katherine (2003). *Bonding and Bridging Social Capital and Their Relationship to Community and Political Civic Engagement*. (Dissertation)  
 Ph.D. Research Practicum, The University of North Carolina at Chapel Hill, School of Social Work;  
 Ph.D. Teaching Practicum, The University of North Carolina at Chapel Hill, School of Social Work; Doctoral Advisor (1999-2003).  
 Positions since graduation: John S. and James L. Knight Foundation (2002-present).

Brewster, Ann B. (2003). *Parent and Teacher Social Capital and the School Success of Youth: A Longitudinal Analysis*. (Dissertation)  
 Ph.D. Research Practicum, The University of North Carolina at Chapel Hill, School of Social Work; Doctoral Advisor (1998-2003).  
 Positions since graduation: (1) Postdoctoral Research Fellow, Cecil G. Sheps Center for Health Services Research, The University of North Carolina at Chapel Hill (2003-2004); (2) Postdoctoral Research Associate, Department of Psychiatry, School of Medicine, The University of North Carolina at Chapel Hill (2004-2005).

Van Dorn, Richard A. (2003). *The impact of local and imported communities on the likelihood of dropping out of public high schools*. (Dissertation with Distinction)

Ph.D. Research Practicum, The University of North Carolina at Chapel Hill, School of Social Work; (2001-2002).

Doctoral Advisor (1998-2003)

Positions since graduation: (1) Postdoctoral Research Fellow, Cecil G. Sheps Center for Health Services Research, The University of North Carolina at Chapel Hill; (2) Assistant Professor, School of Social Work, Florida International University.

Bowen, Natasha K. (1999). *Protective factors and functioning in high risk adolescents*. (Dissertation with Distinction)

Doctoral Advisor and Research Supervisor (1996-1999)

Positions since graduation: (1) Visiting Assistant Research Professor, The University of North Carolina at Chapel Hill, School of Social Work (1999-2002); (2) Assistant Professor, The University of North Carolina at Chapel Hill, School of Social Work (2002-2008); (3) Associate Professor with tenure, The University of North Carolina at Chapel Hill School of Social Work (2008-2013), Professor, The University of North Carolina at Chapel Hill School of Social Work (2013-2015), Professor, Ohio State University School of Social Work (2015-present)

Chapman, Mimi V. (1997). *Neighborhood quality and somatic complaints among American youth*.

Doctoral Advisor and Research Supervisor (1993-1997)

Positions since graduation: (1) Assistant Professor, Columbia University, School of Social Work (1997-2001); (2) Assistant Professor, The University of North Carolina at Chapel Hill, School of Social Work (2001-2007); (3) Associate Professor with tenure, The University of North Carolina at Chapel Hill, School of Social Work (2007-2016); (4) Professor, the University of North Carolina at Chapel Hill, School of Social Work (2016-present).

#### School of Social Work, The University of North Carolina at Chapel Hill: Dissertation Committee

Katie Cotter (2014). Dissertation Committee.

Jenna Tucker (2014). Dissertation Committee, "Home-School Relationships: Three Papers Addressing Limitations in Parent Involvement Theory and Research."

Kirsten Nyrop (2010). Dissertation Committee.

Buchanan, Rachel (2007). Dissertation Committee.

Powers, Joelle (2005). Dissertation Committee, "Evidence-based Program Resource Requirements: A Review of Existing Best Practices for Schools."

(2003-2004). Research Practicum, School Success Profile Learning Organization Measure. Spencer Fellow in Educational Policy, Duke University (2003-04)  
Senior Spencer Fellow in Educational Policy, Duke University (2004-05)  
2004 Outstanding Doctoral Student Award from UNC School of Social Work.

Cook, Patty (2005). Dissertation Committee, "Understanding social support networks and their role in working with economically vulnerable populations."

Positions since graduation: Assistant Professor, University of Kentucky, School of Social Work (2004).

Craig, Carlton D. (2005). Dissertation Committee. "The measurement and psychometric testing of coping instruments in the social sciences.

Positions since graduation: Assistant Professor, University of Kentucky, School of Social Work (2004).

Nash, James K. (1999). Dissertation Committee. "Understanding and preventing youth violence: A pilot test of the Making Choices Skills Training Program." (Mark Fraser: Chair)

Positions since graduation: (1) Assistant Professor, Portland State University, School of Social Work (1999 - ).

School of Social Work, The University of North Carolina at Chapel Hill: Doctoral Independent Study (SOWO 719)

Katie Cotter (Fall, 2012). "Adolescent sense of coherence: The relationship between neighborhood and school environments, informal social control, and fear."

School of Social, The University of North Carolina at Chapel Hill: Doctoral Research Practicum

Charity Sneed Watkins (2015-2016).

Cotter, Katie (Spring, 2013).

Webber, Kristina (2010-2011).

Buchanan, Rachel (2006-2007).

Meier, Andrea (1998).

Doctoral Teaching Mentorship

Loflin, Katherine (2001).

Natasha Bowen (1998).

Chapman, Mimi V. (1994).

School of Social Work, The University of North Carolina at Chapel Hill: MSW Students

Tourville, Jill (1993). "The quality of the parent-child relationship and adolescents willingness to turn to peers for help in times of distress." (Unpublished Manuscript from Independent Study in School of Social Work).

Richards, Kara. (1992). "Military downsizing and its potential implications for Hispanic, black, and white married soldiers." (Unpublished Masters Essay in School of Social Work).

Nash, James (1990). "Parent involvement on early intervention teams." (Masters Essay in School of Social Work).

Meily, Chris & Hemmings, Kelly (1988). "Toward clarification of the relationship between psychological type and marital satisfaction." (Unpublished Masters Essay in School of Social Work).

Gardner-Webb University, NC

Chazon, Timothy Lee (2009). "Social capital: Relationship between social capital and teacher's job satisfaction within a learning organization." (Ph.D. Dissertation, School of Education). (Committee Member).

Smith College, Boston, MA

Williams, Jay A. (1990). "An exploration of affect labeling in impulsive, aggressive boy." (Ph.D. Dissertation, School of Social Work). (Statistical/Computer Advisor).

University of North Florida, Jacksonville, FL

Easterling, Beth. (2005). "The invisible side of military careers: An examination of employment and well-being among military spouses." (Masters Thesis Reader, Department of Sociology, Anthropology, & Criminal Justice).

Wake Forest University, Winston-Salem, NC

Gortner, David T. (1994). "On the question of change and development in the personality and identity formation of young adults." (Masters Thesis Committee Member, Department of Psychology).

### **FUNDED RESEARCH:<sup>3</sup>**

Title: Family Advocacy Prevention: The Way Ahead (Phase II)  
Role: Principal Investigator  
Prime: Kansas State University (Grant # 2015-39575-24367) (Dr. Sandra Stith, Prime Project PI)  
Funder: United States Department of Agriculture, National Institute of Food and Agriculture  
Dates: 01 Sept 2015 – 31 August 2016  
Amount: \$142,960.00 (Full UNC Overhead)  
Description: The main tasks are to conduct a secondary analysis of the 2011 AF Community Assessment Data to examine pathways of influence in the program logic model guiding the secondary prevention of family maltreatment in the U.S. Air Force, as well to identify best-fit, evidence-informed prevention interventions for secondary prevention efforts.

Title: Family Advocacy Prevention: The Way Ahead  
Role: Principal Investigator  
Prime: Kansas State University (Grant # 2014-39575-22642) (Dr. Sandra Stith, Prime Project PI)  
Funder: United States Department of Agriculture, National Institute of Food and Agriculture  
Dates: 01 Sept 2014 – 31 August 2015  
Amount: \$118,239.00 (Full UNC Overhead)

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<sup>3</sup> Between 1993 and 2006, the School Success Profile was administered to approximately 50,000 middle and high school students in approximately 500 public schools and youth serving agencies in the United States, Israel, and Eastern Europe. This work involved more than 150 contracts (typically from \$2,500 to \$5,000) that were processed through the SSP Income Account in the School of Social Work at The University of North Carolina at Chapel Hill.

Description: The main deliverable is to conduct a systematic review focused on safe, stable, and nurturing families and the antecedents that promote them. The key aim of this review is to refine the logic model for secondary prevention efforts for family maltreatment in the United States Air Force (Family Advocacy Program Prevention, Outreach, and Population Behavioral Health Services).

Title: DoD-NIFA Military Family Readiness System (MFRS) Grant

Role: Principal Investigator (UNC Subcontract)

Prime: The University of Minnesota (Dr. Lynne Border, PI)

Funder: United States Department of Agriculture & Department of Defense Partnership

Dates: 01 July 2013 – 31 August 2014

Amount: \$20,000 (\$6,842, Full UNC Overhead)

Description: Provide intellectual and strategic thinking to develop a holistic, social service delivery system model approach to provide a high quality, joint-Service training resource to prepare Family Center/Family Readiness program staff to implement individual programs in specified areas.

Title: Student U Health

Role: Co-Principal Investigator with Dr. Danielle Swick, PI, UNC-Greensboro

Prime: The University of North Carolina at Chapel Hill

Funder: Armfield-Reeves Grants from UNC-CH School of Social Work

Dates: August 2013 – August 2014

Amount: \$12,637.48

Description: Through community-based programming regarding physical health, Student U Health aims to decrease unhealthy behaviors attributable to the onset of obesity and increase feelings of self-worth in underserved Durham Public School students (grades 6-12). Student U Health students will become advocates for education and health change in their community and Student U Health will become a model of effective health and education community-based reform.

Title: Community Capacity Building Project (Phase II)

Role: Co-Principal Investigator with Dr. Jay A. Mancini, University of Georgia

Prime: The University of Georgia

Funder: United States Department of Agriculture & Department of Defense Partnership

Dates: 01 October 2012 – 31 August 2014

Amount: \$1,100,000 (\$452,938 UNC Subcontract)

Description: This project builds a web-based and self-paced delivery system for training family readiness practitioners associated with the National Guard, other Reserve Components, and the Active Component in community capacity building, as well as develops a web-based assessment tool for determining the needs and priorities of military service members and their families.

Title: Building Community Capacity: Models and Methods for U.S. Military Family Support Organizations

Role: Co-Principal Investigator with Dr. Jay A. Mancini, University of Georgia

Prime: The University of Georgia

Funder: United States Department of Agriculture & Department of Defense Partnership via Purdue University

Dates: 01 May 2011 – 30 November 2012

Amount: \$909,090 (\$415,498 UNC Subcontract)

Description: This project develops a conceptual model and identifies practice strategies and assessment tools that will enable military family support organizations to enhance the capacity of communities in achieving desired resiliency/recovery results for military personnel and their families.

Title: DoD-NIFA Military Family Readiness System (MFRS) Grant

Role: Principal Investigator (UNC Subcontract)

Prime: The University of Arizona (Dr. Lynne Border, PI)

Funder: United States Department of Agriculture & Department of Defense Partnership

Dates: 01 October 2011 – 30 September 2013

Amount: \$38,173 (\$12,380 UNC Overhead)

Description: Dr. Gary Bowen will provide intellectual and strategic thinking to develop a holistic, social service delivery system model approach to provide a high quality, joint-Service training resource to prepare Family Center/Family Readiness program staff to implement individual programs in specified areas.

Title: Strengthening Military Families with Children who have Developmental Disabilities: OneStop for Family Support

Role: Co-Principal Investigator with Dr. Irene Zipper

Prime: The University of North Carolina at Chapel Hill

Funder: Administration on Developmental Disabilities of the Administration for Children and Families, U.S. Department of Health and Human Services

Dates: 30 September 2009 – 30 September 2014

Amount: \$1,000,000.00

Description: This project adapts the nationally recognized North Carolina Family Support 360 Project model to serve military families with children who have developmental disabilities in the Camp Lejeune area.

Title: Pathways to School Performance: A “Possible Selves” Intervention

Role: Principal Investigator

Prime: The University of North Carolina at Chapel Hill

Funder: School of Social Work, The Armfield-Reeves Innovation Fund (competitive review)

Dates: 15 August 2009 – 10 May 2010

Amount: \$16,789.00

Description: This project delivers and evaluates an intervention to increase the academic engagement, school success orientation, and retention of sixth-grade students attending the Durham Nativity School (DNS). DNS is a tuition-free, faith-based private middle school for 6<sup>th</sup>-8<sup>th</sup> grade boys from families with low socioeconomic means. The intervention, which is delivered by two MSW students, is anchored in the “possible selves” literature.

Title: Supporting the Implementation of the Building Corps Families (BCF) Website

Role: Lead Principal Investigator

Prime: The University of North Carolina at Chapel Hill

Funder: United States Marine Corps

Dates: 15 October 2008 – 30 September 2009

Amount: \$227,825

Description: Working with Michael Kelly, President, Flying Bridge Technologies, Inc., Dr. Bowen will implement support and resiliency assessment tools for use by Marine Corps Family Team Building staff at all Marine Corps bases worldwide, train program staff in the use of these tools for intervention and prevention planning, develop online training modules, and provide

on-going practice support to program staff. The structure of the Marine Corps assessment tools build on Dr. Bowen and Dr. Jack Richman's highly successful School Success Profile, which Flying Bridge Technologies, Inc. is also a key partner.

Title: National Children's Study, Cumberland County  
Role: Investigator  
Prime: The University of North Carolina at Chapel Hill (Carolina Population Center)  
Dr. Barbara Entwisle (Lead Principal Investigator)  
Funder: National Institute of Child Health and Human Development (NICHD)  
(Sponsor Award Number: HHSN275200800029C)  
Dates: 26 September 2008 – 31 December 2008  
Amount: \$568,920.00  
Description: Working under the auspices of the Carolina Population Center, Dr. Bowen assisted the study team in the design of the data collection plan for military families in Cumberland County, NC, including making contact with senior military officials in DoD, the Department of the Army, and at Fort Bragg, NC.

Title: Examining the Feasibility of an On-Line Support and Resiliency Inventory  
Role: Lead Principal Investigator  
Prime: The University of North Carolina at Chapel Hill  
Funder: North Carolina Department of Health and Human Services, Division of Mental Health, Developmental Disabilities, and Substance Abuse Services (UNC Account No. 5-41972)  
Dates: 05 May 2008 - 30 June 2008  
Amount: \$63,536  
Description: The North Carolina Division of Mental Health, Development Disabilities and Substance Abuse Services has contracted with the School of Social Work at The University of North Carolina at Chapel Hill to examine the feasibility of implementing the SRI as part of the Division's efforts to increase its outreach services and support to military members and their families across North Carolina, which is part of the Governor's Focus on Returning Combat Veterans and their Families.

Title: Using the SSP to Inform an Intervention Plan Addressing Rigor, Relevance, and Relationships to Reduce Student Attrition at the Durham Nativity School  
Role: Principal Investigator  
Funder: Twelve Labours Foundation (no grant number)  
Dates: 1 November 2007 - 30 June 2008  
Amount: \$35,000  
Description: The major goal of this project is to use SSP results to inform an intervention plan to reduce attrition rates, promote academic success, and increase the probability of high school success among 27 middle school students attending a private school for low-income students in Durham, NC.

Title: SBIR Phase II Development of the Online SSP and ESSP  
Role: Investigator (Prime Contract: Flying Bridge Technologies, PI: Mike Kelly)  
Funder: NIH/NIDA Grant # 2R44DA020217-02  
Dates: 30 September 2007 - 31 August 2009  
Amount: \$600,359  
Description: The project involves implementation of advanced online SSP and ESSP assessment and Best Practices database features; development of advanced online commercial interface features;

and an experimental test of the impact of the ESSP assessment and prevention product on the school outcomes of 3<sup>rd</sup>, 4<sup>th</sup>, and 5<sup>th</sup> grade students.

Title: Administration of the SSP (Bridge Project)  
Role: Principal Investigator  
Funder: University of Denver (Graduate School of Social Work) (no grant number)  
Dates: May 2006 - January 2008  
Amount: \$598

Title: Administration of the SSP-Learning Organization  
Role: Principal Investigator  
Funder: Buffalo, NY Public Schools (Department of Youth Services) (No grant number)  
Dates: 1 January 2006 - 12 May 2008  
Amount: \$7,500

Title: Administration of the SSP-Learning Organization  
Role: Principal Investigator  
Funder: School of Social Work, The University of Texas at Austin (no grant number)  
Dates: 1 January 2006 - 30 September 2006  
Amount: \$3,180

Title: Administration of the SSP/SSP-Learning Organization  
Role: Principal Investigator  
Funder: Philliber Research Associates via The Blank Foundation, Atlanta, GA (no grant number)  
Dates: Academic Years 2004-2006 at three high schools: [Bluffton HS (SC), Carl Hayden Community HS (AZ), and The New Schools at Carver in Atlanta (GA)]  
Amount: \$10,000

Title: SBIR Phase I Development of Online SSP and ESSP  
Role: Consultant (80 hours on Online Design of SSP/SSPLO)  
 (Prime Contractor: Flying Bridge Technologies, Inc.)  
Funder: NIH/NIDA Grant Number 1 R43 DA020217-01  
Dates: 1 September 2005 - 31 March 2006  
Amount: \$243,272 (\$499,580 Total)

Title: Evaluating the Effectiveness of the School Success Profile (SSP) Evidence-Based Practice Strategy on School- and Student-Level Performance  
Role: Lead Principal Investigator  
Prime: The University of North Carolina at Chapel Hill  
Funder: Knight Foundation (Award No. A03-0909-002)  
Dates: 01 July 2003 - 30 June 2006  
Amount: \$200,000

Title: Evaluating the Effectiveness of the School Success Profile (SSP) Intervention Package  
Role: Co-Principal Investigator with Dr. Natasha Bowen  
Funder: William T. Grant Foundation (Grant Number 2520)  
Dates: 01 December 2003 - 31 March 2006  
Amount: \$450,000

Description: The evaluation tested the effect of the SSP and its supporting resources on the academic outcomes of middle and high school students in a sample of low performing schools in NC.

Title: ESSP Drug Abuse Prevention Screening Tool: Phase II  
Role: Co-Principal Investigator with Dr. Natasha Bowen (UNC Subcontract)  
Funder: NIDA/NIH STTR Phase II Grant (2 R42DA013865-02, Michael O. Kelly, PI)  
Dates: 01 April 2003 – 31 March 2005  
Amount: \$243,272 (\$499,580 Total)  
Description: University subcontract of NIDA STTR Phase II grant to conduct psychometric tests of ESSP Drug Prevention Screening Tool.

Title: SSP/ESSP Garner, NC Community Development Initiative  
Role: Principal Investigator  
Prime: The University of North Carolina at Chapel Hill  
Funder: Wake Education Partnership (no grant number)  
Dates: October 2003 - March 2004  
Amount: \$21,911

Title: Evaluating the Effectiveness of the School Success Profile (SSP) Evidence-Based Practice Strategy on School- and Student-Level Performance  
Role: Lead Principal Investigator  
Prime: The University of North Carolina at Chapel Hill  
Funder: Knight Foundation (Award No. A03-0909-001)  
Dates: 1 July 2002 - 30 June 2003  
Amount: \$200,000 (plus \$200,000 Challenge Grant)

Title: SSP Drug Abuse Prevention Screening Tool: Development (Pilot Test Supplement)  
Role: Principal Investigator  
Prime: Flying Bridge Technologies (Small Business Technology Transfer)  
Funder: NIH/NIDA (3 R41 DA13865-01S1)  
Dates: 1 September 2001 - 31 August 2002  
Amount: \$101,327

Title: School Success Profile Evaluation Design  
Role: Co-Principal Investigator with Dr. Jack Richman  
Prime: The University of North Carolina at Chapel Hill  
Funder: Knight Foundation (no grant number)  
Dates: July 2001 - June 2002  
Amount: \$84,000

Title: Creation of a Public Use Dataset  
(Data from 26 Knight Communities and Census Bureau Data)  
Role: Principal Investigator  
Funder: Knight Foundation (no grant number)  
Dates: January 2001 - June 2001  
Amount: \$20,000

Title: SSP Drug Abuse Prevention Screening Tool: Development  
Role: Principal Investigator  
Prime: Flying Bridge Technologies (Small Business Technology Transfer)  
Funder: NIH/NIDA (1 R42 DA13865-01)  
Dates: 1 September 2000 - 31 August 2001

Amount: \$98,999

Title: Best Practices for Children At Risk of School Failure  
Role: Co-Principal Investigator with Dr. Jack Richman  
Prime: The University of North Carolina at Chapel Hill  
Funder: Durham, NC Public Schools (no grant number)  
Dates: July 1999 - June 2000  
Amount: \$10,000

Title: School Success Profile Research and Development  
Role: Co-Principal Investigator with Dr. Jack Richman  
Prime: The University of North Carolina at Chapel Hill  
Funder: Knight Foundation (no grant number)  
Dates: July 1998 - July 2001  
Amount: \$581,000

Title: School Success Profile Online  
Role: Co-Principal Investigator with Dr. Jack Richman  
Prime: The University of North Carolina at Chapel Hill  
Funder: Knight Foundation (no grant number)  
Dates: October 1996 - December 1999  
Amount: \$375,000

Title: Orange County CIS Evaluation  
Role: Co-Principal Investigator with Dr. Jack Richman  
Prime: School of Social Work Foundation  
Funder: Orange County Communities In Schools  
Dates: September 1997 - June 1998  
Amount: \$2,500

Title: Orange County CIS Evaluation  
Role: Co-Principal Investigator with Dr. Jack Richman  
Prime: School of Social Work Foundation  
Funder: Orange County Communities In Schools  
Dates: September 1996 - June 1997  
Amount: \$4,000

Title: Integrated Community Based Youth Relocation/Transition Assistance Plan  
Role: Expert Consultant at Request of Department of Defense  
Prime: Corporate Information Center, Redstone Arsenal, Alabama  
Funder: Department of Defense Office of Family Policy (OFP)  
Dates: December 1995 - August 1997  
Amount: \$25,000

Title: Orange County Intervention/Prevention Grant  
Role: Co-Principal Investigator with Dr. Jack Richman  
Prime: School of Social Work Foundation  
Funder: NC Department of Public Instruction  
Dates: December 1995 - July 1996  
Amount: \$6,000

Title: Families for Kids Evaluation: Redesigning Family and Child Welfare Services  
Role: Co-Principal Investigator with Dr. Gary Nelson and Dr. Lynn Usher  
Prime: School of Social Work  
Funder: W.K. Kellogg Foundation  
Dates: August 1995 - August 1996  
Amount: \$150,000

Title: School Success Profile Field Test  
Role: Co-Principal Investigator with Dr. Jack Richman  
Prime: School of Social Work Foundation  
Funder: Knight Foundation  
Dates: September 1995 - December 1996  
Amount: \$50,000

Title: School Success Profile Field Test  
Role: Co-Principal Investigator with Dr. Jack Richman  
Prime: School of Social Work Foundation  
Funder: BellSouth Foundation  
Dates: May 1995 - December 1996  
Amount: \$75,000

Title: Support Our Students (SOS) Evaluation Plan  
Role: Co-Principal Investigator with Dr. Jack Richman  
Prime: School of Social Work Foundation  
Funder: NC Department of Human Resources  
Dates: March 1995 - June 1995  
Amount: \$30,000

Title: Orange County Intervention/Prevention Grant  
Role: Co-Principal Investigator with Dr. Jack Richman  
Prime: School of Social Work Foundation  
Funder: NC Department of Public Instruction  
Dates: January 1995 - July 1995  
Amount: \$6,000

Title: Cities-in-School Outcome Evaluation  
Role: Co-Principal Investigator with Dr. Jack Richman  
Prime: School of Social Work Foundation  
Funder: BellSouth Foundation  
Dates: May 1992 - August 1994  
Amount: \$204,000

Title: Cities-in-School Outcome Evaluation  
Role: Expert Consultant  
Prime: School of Social Work Foundation; Principal Investigator: Dr. Jack Richman  
Funder: Cities-in-School Board of Directors  
Dates: July 1991 - October 1991  
Amount: \$4,000

Title: Evaluation Design II for NC Job Opportunities and Basic Skills Program  
Role: Evaluation Design and Measurement Consultant  
Prime: UNC-CH School of Social Work; Principal Investigator: Dr. Dennis Orthner  
Funder: NC Division of Social Services  
Dates: January 1991 - June 1991  
Amount: \$208,715

Title: Evaluation Design I for NC Job Opportunities and Basic Skills Program  
Role: Evaluation Design and Measurement Consultant  
Prime: UNC-CH School of Social Work; Principal Investigator: Dr. Dennis Orthner  
Funder: NC Division of Social Services  
Dates: August 1990 - January 1991  
Amount: \$28,095

Title: Child Care Recycling Fund Experiment  
Role: Principal Investigator  
Prime: UNC-CH School of Social Work  
Funder: UNC-Chapel Hill University Research Council  
Dates: December 1989 - November 1991  
Amount: \$2,100

Title: Day Care Waiting List Analysis  
Role: Co-Principal Investigator  
Prime: UNC-CH School of Social Work Foundation  
Funder: Child Care Resources Incorporated  
Dates: November 1989 - August 1990  
Amount: \$7,870

Title: Day Care Evaluation Project  
Role: Principal Investigator  
Prime: UNC-CH School of Social Work  
Funder: U.S. Department of Health and Human Services  
Dates: December 1988 - June 1991  
Amount: \$98,150

Title: Family Factors & the Retention Decision-Making Process of Military Members:  
A Secondary Analysis  
Role: Principal Investigator  
Prime: UNC-CH School of Social Work  
Funder: IBM Jr. Faculty Development Award, UNC-Chapel Hill Foundation  
Dates: January 1988 - December 1988  
Amount: \$3,000

Title: Family Advocacy Program Resources in the State of Alaska  
Role: Project Advisor  
Prime: Caliber Associates; Principal Investigator: Mr. Jerry Croan  
Funder: U.S. Department of the Navy  
Dates: October 1987 - January 1989  
Amount: \$98,334 (Amount to Caliber)

Title: Identification of Strong/Well Families and the Mechanisms to Support Them  
(Task 1 of 5 Task Contract: Family Factors in Retention, Readiness, & Sense of Community; Prime Contractor: Research Triangle Institute)

Role: Principal Investigator: Task 1

Prime: Research Triangle Institute; Principal Investigator: Dr. Alvin Cruze

Funder: U.S. Army Research Institute for the Behavioral & Social Sciences

Dates: January 1987 - February 1990

Amount: \$2.3 M for Task 1 (Five Years) (Awarded to RTI)

Title: Project SAFE: Cost-Effectiveness Evaluation

Role: Senior Design Consultant

Prime: Caliber Associates; Principal Investigator: Mr. Jerry Croan

Funder: U.S. Department of the Navy

Dates: June 1986 - January 1989

Amount: \$197,406 (Awarded to Caliber)

Title: Family Strength and Adaptation to Army Life: A Focus on Variations in Family Values and Expectations across Racial/Ethnic Group and Rank

Role: Principal Investigator

Prime: Caliber Associates

Funder: Department of the Army Office of the Chief of Chaplains

Dates: October 1986 - October 1987

Amount: \$96,500 (Awarded to Caliber)

Title: Child Care Welfare Savings Demonstration Project

Role: Principal Investigator

Prime: UNC-CH School of Social Work

Funder: U.S. Department of Health and Human Services

Dates: August 1986 - May 1987

Amount: \$29,948

Title: Evaluation Study of Community Services and Youth Activities in the Army Family Action Plan

Role: Senior Research Scientist

Prime: Caliber Associates/University of Georgia;

Principal Investigators: Mr. Jerry Croan/ Dr. Dennis Orthner

Funder: Department of the Army Community Support Center

Dates: November 1985 - August 1987

Amount: \$150,000

Title: Plan for Research on Army Families

Role: Panel Member

Prime: Battelle Research

Funder: U.S. Army Research Institute for the Behavioral and Social Sciences

Dates: October 1985 - January 1986

Amount: \$6,463

Title: Retention and the Military Family

Role: Panel Member

Prime: Battelle Research

Funder: U.S. Army Research Institute for the Behavioral and Social Sciences  
Dates: June 1985 - September 1985  
Amount: \$7,557

Title: Framework for Research on Career Decision Making and the Military Family  
Role: Panel Member  
Prime: Battelle Research  
Funder: U.S. Army Research Institute for the Behavioral and Social Sciences  
Dates: July 1985 - September 1985  
Amount: \$6,057

Title: Domestic Violence Survey Systems Feasibility Study  
Role: Project Director  
Prime: Westat Inc.  
Funder: NIH, Centers for Disease Control, Violence Epidemiology Branch  
Dates: October 1984 - May 1985  
Amount: \$132,541

Title: The 1985 Army Veterans Survey  
Role: Project Director  
Prime: Westat Inc.  
Funder: U.S. Army Research Institute for the Behavioral and Social Sciences  
Dates: September 1984 - May 1985  
Amount: \$449,555

Title: Documentation of Mechanisms to Facilitate Adoption of Waiting Children:  
Adoption Services for Minority Children and Adoption Exchanges  
Role: Senior Statistical Analyst  
Prime: Westat Inc.; Principal Investigator: Ms. Ronna Cooke  
Funder: U.S. Department of Health and Human Services, Children's Bureau  
Dates: October 1985 - May 1985  
Amount: \$225,000

Title: Study of the Adaptation of Adolescents in Foster Care to Independent  
and Community Life  
Role: Senior Analyst  
Prime: Westat Inc.; Principal Investigator: Ms. Ronna Cooke  
Funder: U.S. Department of Health and Human Services, Children's Bureau  
Dates: January 1984 - May 1985  
Amount: \$161,657

Title: Evaluation of the Impact of Air Force Family Support Centers  
on Air Force Personnel & their Families  
Role: Project Director  
Prime: SRA Technologies  
Funder: Department of the Air Force, Office of Family Matters  
Dates: August 1983 - October 1984  
Amount: \$218,782

Title: Navy Family Program Training Guide

Role: Project Consultant  
Prime: Resource Consultants Incorporated  
Funder: Department of the Navy  
Dates: July 1983 - August 1983  
Amount: \$2,000

Title: Assessment of U.S. Navy Family Advocacy Program:  
Service Need versus Service Response  
Role: Project Director  
Prime: SRA Technologies; Corporate Officer in Charge: Mr. Jerry Croan  
Funder: Office of Naval Research (ONR)  
Dates: October 1982 - October 1983  
Amount: \$250,000  
Description: First major study of the implementation of the Family Advocacy Program in the U.S. Military.

Title: Evaluation of Air Force Family Support Centers  
Role: Senior Research Associate  
Prime: Family Research & Analysis; Principal Investigator: Dr. Jay Mancini  
Funder: Department of the Air Force, Office of Family Matters  
Dates: July 1981 - September 1982  
Amount: \$250,000

Title: Families-in-Blue: Opportunities for Ministry  
Role: Co-Project Director  
Prime: Family Research & Analysis; Co-Project Director: Dr. Dennis Orthner  
Funder: Department of the Air Force, Office of the Chief of Chaplains  
Dates: January 1982 - September 1982  
Amount: \$72,000

Title: An Investigation of U.S. Air Force Married and Single Parent Family Patterns  
in the Pacific  
Role: Co-Project Director  
Prime: Family Research & Analysis; Co-Project Director: Dr. Dennis Orthner  
Funder: Department of the Air Force, Office of the Chief of Chaplains  
Dates: September 1980 to October 1981  
Amount: \$99,000

Title: A Training Program for Directors of Pilot Family Support Centers in USAF  
Role: Co-Project Director  
Prime: Family Research & Analysis; Co-Project Director: Dr. Dennis Orthner  
Funder: Department of the Air Force, Office of Family Matters  
Dates: January 1981 - June 1981  
Amount: \$42,000

Title: Families-In-Blue (Phase I)  
Role: Data Analyst and Report Writer  
Prime: Family Research & Analysis; Project Director: Dr. Dennis Orthner  
Funder: Department of the Air Force, Office of the Chief of Chaplains  
Dates: September 1980 - October 1981

Amount: \$57,000

Title: Family Patterns in the U.S. Air Force: A Critical Analysis with Implications for Chaplain Services, Programs, and Professional Development

Role: Data Analyst

Prime: Family Research & Analysis; Project Director: Dr. Dennis Orthner

Funder: Department of the Air Force, Office of the Chief of Chaplains

Dates: July 1979 - August 1979

Amount: \$8,000

#### **PAPERS PRESENTED (SELECTED-1980 to PRESENT):<sup>4</sup>**

##### International

(2015, October). "Improving community health through mobilizing formal systems and informal networks." Paper presented at the 3<sup>rd</sup> GRF One Health Summit, Davos, Switzerland (with Jay A. Mancini)

(2013, June). "Community capacity building in support of service members and their families in the U.S. Military. Paper presented at the 12<sup>th</sup> Biennial Conference of the European Research Group on Military and Society, Madrid, Spain. (with James A. Martin & Jay A. Mancini)

(2011, June). "Community capacity and the psychological well-being of married U.S. Air Force members. Paper presented at the 11<sup>th</sup> Biennial Conference of the European Research Group on Military and Society, Amsterdam, The Netherlands. (with James A. Martin)

(2010, October). "Cross national use of evaluation technology: The School Success Profile." Paper presented at the 3<sup>rd</sup> International Conference of Education, Research and Innovation (ICERI), Madrid, Spain. (with D. Damean, M. Roth, & P. Haragus.

(2010, May). "Pathways to School Persistence: Key Findings from the School Success Profile (1993 to 2010) for Middle and High School Students in the United States," (2) "Schools as Learning Organizations: The School Success Profile Learning Organization," (3) "Parents' School Behavior Expectations and End-of-Grade Performance in Math and Reading: A Longitudinal Analysis of Middle School Students in the United States," (4) "Validity and Fidelity of the School Success Profile." Four papers presented at the Social Ecology of School Success: Implications for Policy and Practice, Babes-Bolyai University, Cluj-Napoca, Romania.

(2002, June). "The Community Assets Inventory: A Framework for Informing and Monitoring Community-Based Prevention Efforts." Paper presented at the Hawaii International Conference on the Social Sciences, Honolulu, HI. (with Jay A. Mancini & James A. Martin)

(1998, May). "Children and Youth At Risk." Comments delivered at the Bi-National Israel – North Carolina Workshop on Youth Violence, Trauma, & Multi Problem Youth. Sponsored by the North Carolina Israel Partnership/JDC – Brookdale Institute, Jerusalem, Israel.

(1997, September). "Where's the Outrage: America's Youth in Peril." Invited response to James Garbarino presentation, "Making Sense of Violence: What Children and Youth Can Tell Us." Presented at the Violence and Trauma in Childhood: A Risk & Resilience Perspective: An International Conference. Sponsored by the North Carolina-Israel Partnership, Chapel Hill, NC.

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<sup>4</sup> I have attempted to keep track of these presentations over the years. However, I have missed adding some presentations.

National

(2016, January), "Secondary prevention of family maltreatment in the U.S. Air Force: A systematic review (Paper Presentation). Society for Social Work Research, Washington, DC (with Todd M. Jensen).

(2016, January). "Intimate partner violence perpetration and victimization in same-sex and mixed-sex couples" (Paper Presentation). Society for Social Work Research, Washington, DC (with Laurie M. Graham, Todd M. Jensen, Ashley Givens, & Cynthia Frago Rizo).

(2016, January), "Intimate Partner Violence in LGBTQ Communities" (Symposium Presider). Society for Social Work Research, Washington, DC

(2015, November). "Looking backward, moving forward: Reuben Hill and future research on military families" (Paper Presentation). National Council on Family Relations Annual Meeting, Vancouver, B.C., Canada (with Jay Mancini).

(2015, November). "Secondary prevention of family maltreatment in the U.S. Air Force: A systematic review" (Paper Presentation). National Council on Family Relations Annual Meeting, Vancouver, B.C., Canada (with Todd Jensen).

(2015, November). "Social involvement, social responsibility, and USAF members' willingness to seek help" (Poster Presentation). National Council on Family Relations Annual Meeting, Vancouver, B.C., Canada (with Todd Jensen).

(2015, January), "Late-life divorce and life satisfaction" (Paper Presentation), Society for Social Work and Research Annual Conference, New Orleans, LA (with Todd Jensen).

(2015, January), "Late-life divorce and parents' perceptions of child adjustment" (Paper Presentation), Society for Social Work and Research Annual Conference, New Orleans, LA (with Todd Jensen).

(2014, November), "Social Capital and Youth Outcomes in Military Families" (Paper Presentation), National Council on Family Relations Annual Meeting, Baltimore, MD (with Jay A. Mancini, Catherine O'Neal, and Amy Arnold).

(2014, November), Panel Presentation, "Advancing the Research Agenda" (Invited Panelist), National Council on Family Relations Annual Meeting, Baltimore, MD. Organized by Dr. Lynne Borden and Dr. Danny Perkins with five additional panel members: Abigail Gewirtz, Jay Mancini, Shelly MacDermid Wadsworth, Keith Aronson, & Brent Elrod.

(2012, November), "Community Capacity Building and Health in the US Military" (Invited Symposium), National Council on Family Relations Annual Meeting, Phoenix, AZ. Organized by Gary L. Bowen, Jay A. Mancini, & James A. Martin with four panel members: A Laura Arnold, Anne F. Farrell, Danielle Swick, and Irene Nathan Zipper. Six papers presented.

(2012, January). "Schools as Learning Organizations: A Cross-Cultural Validity Study of the School Success Profile Learning Organization Measure in Israel." Paper presented at the Society for Social Work and Research Annual Conference, Washington, DC (with Ruth Berkowitz, Rami Benbenishty, & Joelle Powers).

(2012, January). Discussant, Military Couples and Families Coping with the Deployment Cycle. Symposium at the Society for Social Work and Research Annual Conference, Washington, DC (Organizer: Ruth Paris, Boston University).

(2010, November). "The Support and Resiliency Inventory for Military Families." Paper presented at 2010 Annual Conference of the National Council on Family Relations, Minneapolis, MN.

(2010, January). "The Unit Assets Inventory: A Support & Resiliency Assessment Tool to Enhance Social Service Practice in the U.S. Air Force." Paper presented at the Society for Social Work and Research Annual Conference, San Francisco, CA. (with James A. Martin).

(2010, January). "Schools as Learning Organizations: Organizational Culture and Teachers' Self-Efficacy." Paper presented at the Society for Social Work and Research Annual Conference, San Francisco, CA.

(2009, November). Dr. Gary L. Bowen, Kenan Distinguished Professor, was an invited guest speaker at the 2009 Annual Conference of the National Council on Family Relations, which met in San Francisco, CA. He served on a panel with Dr. Shelley MacDermid and Dr. Dennis Orthner in a session designed to increase understanding of the factors that contribute to resilience in military families. Dr. Bowen served as the facilitator and presider in a special session at the conference on Building Bridges to Support Military and Veteran Families with CDR Brenda Gearhart, Division Chief, Outreach Clearinghouse, Outreach and Advocacy Directorate, Defense Centers of Excellence for Psychological Health and Traumatic Brain Injury.

(2009, November). On behalf of Mrs. Dianne Campbell, spouse of the Commanding General, U.S. Army Forces Command (FORSCOM), Dr. Gary L. Bowen, Kenan Distinguished Professor, spoke to approximately 50 spouses of the Army's most senior combat commanders and their command sergeants major on "Building Resilient Families through Community Capacity Building." The Commander's Conference was held from November 16-18, 2009, in Atlanta, Georgia.

(2009, June). "Families and Communities." Panel organizer and presenter at 2009 Groves Conference on Marriage and Family, Chapel Hill, NC. (Panel Members: Jay Mancini, Angela Huebner, Dennis Orthner).

(2009, January). "Parents' school behavior expectations and the academic performance of middle school students: A longitudinal analysis." Paper presented at the Society for Social Work and Research Annual Conference, New Orleans, LA. (with Roderick Rose and Elizabeth Glennie).

(2009, January). "Social capital as predictor and mediator of school engagement, trouble avoidance and academic performance of middle school students." Paper presented at the Society for Social Work and Research Annual Conference, New Orleans, LA. (with Roderick Rose and Michael Woolley).

(2009, January). "Social sources of strengths for Latino middle school students: Direct and mediated support from teachers, family, and friends." Paper presented at the Society for Social Work and Research Annual Conference, New Orleans, LA. (with Michael Woolley and Kelli Koi).

(2009, January). Invited Panel Presentation, "Community Capacity Building for Military Families." Presented at the Addressing Substance Abuse and Comorbidities among Military Personnel, Veterans, and their Families: A Research Agenda meeting co-sponsored by the National Institute on Drug Abuse (NIDA), U.S. Department of Defense (DoD), Veterans Administration (VA), National Institute of Mental Health (NIMH), National Institute on Alcohol Abuse and Alcoholism (NIAAA), National Heart, Lung, and Blood Institute (NHLBI), National Cancer Institute (NCI), and National Institutes of Health (NIH).

(2008, November). Chair and Moderator, "Evidence-Based Practice: Linking Research and Practice." Presented at the National Council on Family Relations 70<sup>th</sup> Annual Conference, Little Rock, AR. (Panel Members: Elaine Anderson, Jane Gilgun, Shirley M. H. Hanson, Leigh Leslie, Terrance Olson, and Stephen Small)

(2008, November). Discussant, Economic Lenses of Family (4 papers). Presented at the National Council on Family Relations 70<sup>th</sup> Annual Conference, Little Rock, AR. (Chair of Session: Jing Jian Xiao)

(2008, November). Fellows Round Tables, "Military Families: Support and Resiliency." Presented at the National Council on Family Relations 70<sup>th</sup> Annual Conference, Little Rock, AR.

(2008, January). "Perceived Social Environment and the School Success of Middle School Students: A Longitudinal Analysis." Paper presented at the Society for Social Work and Research Annual Conference, Washington, DC. (with Roderick A. Rose)

(2008, January). "Vicarious and Anticipated Strains and the Delinquency-related Outcomes of Middle School Students: A Latent Class Analysis." Paper presented at the Society for Social Work and Research Annual Conference, Washington, DC. (with Bridget E. Weller and Natasha K. Bowen)

(2008, January). Discussant for the SSP Research Symposium, "Social Environment Influences on the Academic Success of Middle and High School Students: The School Success Profile." Presented at the Society for Social Work and Research Annual Conference, Washington, DC. (Participants: Susan Stone, Michael E. Woolley, Kate L. Phillippo, Stephanie C. Berzin, and G. Lawrence Farmer)

(2007, November). "Perceived Social Environment and the School Success of Middle School Students." Paper presented at National Council on Family Relations 69<sup>th</sup> Annual Conference, Pittsburgh, PA. (with Roderick A. Rose)

(2007, November). "Military Families: Lunch with Legends." Invited round table discussion at National Council on Family Relations 69<sup>th</sup> Annual Conference, Pittsburgh, PA.

(2007, November). "Evidence-Based Practices and Bridging Research to Practice." Invited Leadership Panel at Communities In Schools National Conference, Leadership for Change: A Nation Without Dropouts. Atlanta, GA. (other panelists: Kristen Anderson Moore, Gerald Croan, & Jacqueline Williams Kaye)

(2006, July). "Linking Research to Practice." Invited closing address at the Family-School Relations during Adolescence: Linking Interdisciplinary Research and Practice Conference, Duke University, Durham, NC. (Funded by the National Science Foundation)

(2006, January). "Quasi-experimental strategies when randomization fails: Propensity score matching and sensitivity analysis." Paper presented at the 2006 Annual Conference of the Society for Social Work and Research, San Antonio, TX. (with Shenyang Guo and Roderick A. Rose)

(2006, January). "Opening the 'black box' of implementation fidelity in school-based interventions." Paper presented at the 2006 Annual Conference of the Society for Social Work and Research, San Antonio, TX. (with Bridget E. Weller and Roderick A. Rose)

(2005, January). "Power in social work research: Techniques for designing intervention studies with multilevel data structures." Paper presented at the 2005 Annual Conference of the Society for Social Work and Research, Miami, FL. (with Roderick A. Rose)

(2004, November). "School Success Profile: From assessment to action." Paper presented at National Council on Family Relations 66<sup>th</sup> Annual Conference, Orlando, FL. (Co-Chair of Session with Angela Huebner on Youth Surveys: From Assessment to Action)

(2004, November). Bowen, G. L., Martin, J. A., & Ware, W. B. "Community capacity and the health of married active duty members." In G. L. Bowen (Chair), *Community capacity and the health of military families*. Symposium conducted at the National Council on Family Relations 66<sup>th</sup> Annual Conference, Orlando, FL.

(2004, July). Bowen, G. L., Martin, J. A., Mancini, J. A., Whitworth, J. D., & Spera, C. "The science and practice of community capacity building: Empirical analysis of the 2003 Air Force Community Assessment." In M. J. Schwerin

(Chair), *Exploring the new social compact—Supporting the military family*. Symposium conducted at the American Psychological Association Convention, Honolulu, HI.

(2004, April). "Designing, developing, and delivering effective human services in 21<sup>st</sup> century military communities: Using survey data to inform family & community practice." Workshop presentation at the 19<sup>th</sup> Annual Uniformed Services Social Workers (USSW) Conference, Washington, DC. (with James A. Martin)

(2004, April). "Military families: Developing and sustaining resilience." Briefing presented at the Fifth Annual Public Policy and Education Conference, Washington, DC. (with Jay A. Mancini, James A. Martin, Dennis K. Orthner, Deborah Levin)

(2004, February). "In the face of a dangerous community: The effects of social support and neighborhood danger on high school students' school outcomes." Paper presented at the Western States Communication Association, Albuquerque, NM. (with Lawrence B. Rosenfeld, Jack M. Richman, & Scarlet L. Wynns)

(2004, January). "The impact of parental education and adult social support on the school success of Latino and African American Youth." Paper presented at the Eighth Annual Conference of the Society for Social Work and Research, New Orleans, LA. (with Ann B. Brewster)

(2004, January). "Statistical procedures for determining the validity and reliability of a multidimensional survey instrument: The School Success Profile." Poster presented at the Eighth Annual Conference of the Society for Social Work and Research, New Orleans, LA. (with Roderick Rose & Natasha Bowen)

(2004, January). "In the context of risk: The impact of social capital and internal assets on the school engagement of middle and high school students." Paper presented at the Eighth Annual Conference of the Society for Social Work and Research, New Orleans, LA. (with Michael Woolley, Natasha Bowen, & Joelle Powers)

(2004, January). "Using survey results to identify intervention targets for promoting school success: Links to evidence-based practice." Paper presented at the Eighth Annual Conference of the Society for Social Work and Research, New Orleans, LA. (with Joelle Powers)

(2003, February). "A Results Management Approach to Building Community Capacity in Military Communities: The Development and Operation of the USAF Integrated Delivery System." San Diego, CA: Uniformed Services Social Work Conference. (with James A. Martin, Jay A. Mancini, John P. Nelson, & Jeffrey B. Paddock)

(2003, January). "Characteristics of a High Quality Screening Instrument: The Elementary School Success Profile (ESSP)," 7<sup>th</sup> Annual Conference of the Society for Social Work and Research, Washington, DC. (with Natasha K. Bowen & Michael Woolley)

(2002, November). "Developmental Validity of Child Self-Report Instruments: Cognitive Pretesting the Elementary School Success Profile." Paper for Discussion at the 32<sup>nd</sup> Annual Theory Construction and Research Methodology Workshop "Bridging Theory and Research," Houston, TX.

(2002, October). "The Elementary School Success Profile: A measurement instrument." Paper presented at 14<sup>th</sup> Annual National Dropout Prevention Network Conference, San Diego, CA. (with Michael Woolley and Natasha Bowen)

(2002, January). "Teacher support and school engagement for Latino middle and high school students at-risk of school failure." Paper presented at the Sixth Annual Conference of the Society for Social Work and Research, San Diego, CA. (with Ann Brewster)

(2002, January). "Ecological disadvantage as a barrier to the development of social capital: Effects on child and family well-being." Paper presented at the Sixth Annual Conference of the Society for Social Work and Research, San Diego, CA. (with Katherine T. Loflin & Richard A. Van Dorn)

(2001, November). "What We Are Learning About Working with Policymakers: The Community Assets Inventory." Paper presented at National Council on Family Relations 63<sup>rd</sup> Annual Conference, Rochester, NY.

(2001, November). "Poverty, Welfare, and Children." Discussant of four papers at National Council on Family Relations 63<sup>rd</sup> Annual Conference, Rochester, NY.

(2001, March). Visiting Scholar Presentation, "Forging Community Connections to Protect Children from Violence." Public lecture to faculty and students, Virginia Polytechnic Institute & State University, Blacksburg, VA.

(2001, March). Invited Speaker, "Forging Community Connections to Protect Children from Violence: A Results Management Approach," Paper presented at Fourth National Roundtable on Innovative Community-Based Partnerships, Atlanta, GA.

(2000, July). Invited Plenary Speaker, "Building and Sustaining Community Capacity: A Results Management Approach," Paper presented at the USAF Worldwide Prevention Training Conference, San Diego, CA.

(2000, February). Invited Plenary Speaker, "Beyond Columbine: Lessons for Parents, Educators and Community Leaders," Parent University, Travis AFB, CA.

(1999, November). Invited Panel Discussant, "Collaborating to Learn: More Lessons to School-College Partnerships in the Excellence in Education Program" by Policy Studies Associates, Inc. National Conference on School/College Collaboration, Excellence in Education Meeting of Knight Foundation Project Representatives, Washington, DC.

(1999, November). Invited Presentation, "The School Success Profile." The Donors Forum, Fort Lauderdale, FL. (with Jack Richman)

(1999, July). Invited Plenary Presentation, "Community resilience." Paper presented at the USAF Family Advocacy Prevention Conference, San Antonio, TX.

(1999, May). "Outcome measures for Air Force Family Advocacy Program community prevention and intervention." Briefing presented at the USAF-FAP/USDA Research Meeting, San Antonio, TX. (with Barbara Rudin)

(1999, March). "Measuring risk, protection and resilience." Paper presented at the Council on Social Work Education 45<sup>th</sup> Annual Program Meeting, San Francisco, CA. (with James K. Nash)

(1999, February). "Perceived crime and informal social control in the neighborhood as a context for adolescent behavior: A risk and resilience perspective." Paper presented at the Society for Social Work and Research Annual Conference, Austin, TX. (with James K. Nash)

(1998, June). "Crime and Violence in the Lives of Youth: If You Aren't Outraged, You're Not Paying Attention." Invited Plenary Presentation, Northwest Council on Family Relations, Eugene, OR.

(1998, April). "Resilience and Risk in Childhood: Implications for Practice," Member of panel presentation at American Orthopsychiatric Association 75<sup>th</sup> Annual Meeting, Arlington, VA.

(1998, March). "The School Success Profile Online," Paper presented at the Council on Social Work Education Annual Conference, Orlando, FL. (with Jack Richman)

- (1998, February). "The School Success Profile," Management Workshop provided at the 1998 Communities In Schools National Conference, Washington, DC. (with Susan Brown & Sarah Schueneman)
- (1998, February). "Findings from the School Success Profile," Symposium at the Society for Social Work and Research International Conference, North Miami, FL. (with Mimi V. Chapman, Jack M. Richman, & Lawrence B. Rosenfeld)
- (1997, November). "Parental Involvement with Children's Education," Research Update for Practitioners. (Plenary Session), National Council on Family Relations, Arlington, VA.
- (1997, November). "Risks and Assets among Students 'At Risk' of School Failure: A Comparative Analysis," Paper with Jack M. Richman & Natasha Bowen, National Council on Family Relations, Arlington, VA.
- (1997, November). "The School Success Profile-On Line," Workshop on Instructional Technologies: How Did We Get Here? Where Are We Going? National Council on Family Relations, Arlington, VA.
- (1997, June). "Military Families: Past and Present," Invited Plenary Presentation at Air Mobility Command Conference, Hollywood, FL.
- (1996, November). "School-Family Interaction and Achievement," Invited Public Policy Seminar, National Council on Family Relations Annual Conference, Kansas City, MO.
- (1996, November). "Social Environmental Correlates of Physical Symptoms in Youth at Risk for School Drop-out," Poster Session with Mimi Chapman, National Council on Family Relations Annual Conference, Kansas City, MO.
- (1996, March). "The School Success Profile (SSP): The Role of Parent Support," Poster Session, Groves Conference on Marriage and the Family, San Diego, CA.
- (1995, November). "Military Family Adaptation: Antecedents and Consequences," Round Table, National Council on Family Relations Annual Conference, Portland, OR.
- (1995, October). "The School Success Profile (SSP): Closing the gap between service need and service response." Symposium presented at the National Association of Social Workers Annual Conference, Philadelphia, PA. (with Jack M. Richman)
- (1994, November). Discussant for paper by Susan Kwiecien, "Everyday is a different day living in a stepfamily: An interpretative case study," and paper by Masako Ishii-Kuntz, "Methodological challenges to study ethnic minority families." Theory Construction and Research Methodology Workshop, National Council on Family Relations Annual Meeting, Minneapolis, MN.
- (1994, November). "Gay sons and straight parents: The 'coming out' process and parent responses and adaptation." Paper presented at the National Council on Family Relations Annual Conference, Minneapolis, MN.
- (1994, November). "Marital enrichment to help couples cope with military base closure." Paper presented at the National Council on Family Relations Annual Conference, Minneapolis, MN. (with Judith A. Graham)
- (1994, November). "The significance of professional identity diversity within the NCFR." Paper presented at the National Council on Family Relations Annual Conference, Minneapolis, MN. (with Bron B. Ingoldsby)
- (1994, February). Invited Plenary. "The 'science' of family support: Bridging the moat between research and practice." Annual Meeting of the Southeastern Council on Family Relations, Atlanta, GA.

(1993, October). "The doctoral applicant pool." Paper presented at the Group for the Advancement of Doctoral Education (GADE) 1993 Annual Meeting. St. Louis, MO. (with Robert Green)

(1992, November). Symposium Organizer and Presider, "The study of family adaptation in the U.S. Military: Is a fresh perspective needed?" National Council on Family Relations Annual Conference, Orlando, FL. (Participants: D.K. Orthner, Joe F. Pittman, Paul A. Gade, Barbara J. Janofsky, Vaughn R.A. Call, John P. Nelson)

(1992, November). "Family patterns and adaptation in the U.S. Army: A Double ABC-X perspective." Paper presented at the National Council on Family Relations Annual Conference, Orlando, FL. (With D.K. Orthner & Laura Zimmerman)

(1992, November). "How changes in dating relationships affect work attitudes and performance." Paper presented at the National Council on Family Relations Annual Conference, Orlando, FL. (With D.K. Orthner & Laura I. Zimmerman)

(1991, November). "Child care as an economic incentive and support for the working poor." Paper presented at the National Council on Family Relations Annual Meeting, Denver, CO.

(1991, November). "NCFR membership survey results." Presentation made at the National Council on Family Relations Annual Meeting, Denver, CO.

(1990, November). "State supported day care assistance and the economic self-sufficiency of AFDC recipients." Paper presented at the National Council on Family Relations Annual Meeting, Seattle, WA.

(1990, November). Discussant for paper by Richard B. Miller & David W. Wright, "Detecting and correcting attrition bias in longitudinal family research." Theory Construction and Research Methodology Workshop, National Council on Family Relations Annual Meeting, Seattle, WA.

(1989, November). "Expanding day care to low-income parents: The recycling fund concept." Paper presented at the National Council on Family Relations Annual Meeting, New Orleans, LA.

(1989, November). Discussant for paper by Rebecca J. Erickson & Amy S. Wharton, "Emotion management: The neglected link between work and family life." Theory Construction and Research Methodology Workshop, National Council on Family Relations Annual Meeting, New Orleans, LA.

(1989, November). "Self-disclosure and marital quality: A reexamination and extension." Paper presented at the Speech Communication Association Annual Meeting, Small Group Interaction Division, San Francisco, CA. (Co-presenter: Dr. Lawrence Rosenberg).

(1988, November). "Assessing family values and their impacts: A comparison of Q-sort and survey methodologies." Paper presented at the National Council on Family Relations Annual Meeting, Philadelphia, PA. (Co-presenter: Dr. Barbara Janofsky)

(1988, November). "Open vs. closed and intimate vs. nonintimate dual-earner couples: Differences in extramarital support." Paper presented at the 1988 Speech Communication Association, New Orleans, LA. (Co-presenter: Dr. Lawrence Rosenberg).

(1988, April). Invited Panelist, "Military transcultural family: Needs and policy development." Paper presented at the Transcultural Family National Conference IV, Chevy Chase, MD.

(1987, November). "Family life satisfaction: A value-based approach." Paper presented at the Theory Construction and Research Methodology Workshop, National Council on Family Relations Annual Meeting, Atlanta, GA.

(1987, November). "Strategies for family ministry in the U.S. Army: A focus on variations in family values and expectations." Paper presented at the National Council on Family Relations Annual Meeting, Atlanta, GA.

(1987, November). "Challenges of military fathering." Workshop presented with LtCol Frankie Jones at the Post Conference on Youth in Military Families, National Council on Family Relations Annual Meeting, Atlanta, GA.

(1987, June). Invited Plenary Presentation, "Family strength and adaptation in the U.S. Army: A focus on racial/ethnic group differences." Briefing presented at the Department of the Army Multicultural Conference, Atlanta, GA.

(1987, June). "Asian-wife marriages in the U.S. Military: A comparative analysis with White- and Black-wife marriages." Paper presented at the 1987 NASW Minority Issues Conference: Celebrating Our Strengths, Washington, DC.

(1987, June). "Strategies for family ministry in the U.S. Army: Focus on variations in family values and expectations." Paper presented at the International Conference on Family Strengths, Pepperdine University, Malibu, CA. (Co-presenter: COL. Gary A. Bowker, U.S. Army)

(1987, June). Invited Plenary Presentation, "Variations in family values and expectations across racial/ethnic group and rank." Briefing presented at the 41st Annual Command Chaplains Conference, Arlington, VA.

(1987, March). Invited Plenary Presentation, "The history and development of family programs in the U.S. Military." Marine Corps Family Service Center Conference, Xerox Center, Leesburg, VA.

(1986, December). Invited Presider, "Strategic planning from a human service delivery system perspective: The next step." Paper presented at the first annual Worldwide Air Force Family Support Center Conference, Washington, DC.

(1986, November). "Spouse support and the retention intentions of Air Force members." Paper presented at the National Council on Family Relations Annual Meeting, Dearborn, MI.

(1986, November). "Non-academic career opportunities for family scientists." Paper presented at the National Council on Family Relations Annual Meeting, Dearborn, MI.

(1986, August). "The influence of family factors on the retention decision-making process of military members." Paper presented at the Ninety-Fourth Convention of the American Psychological Association, Washington, DC.

(1986, July). "An ecosystem model of work and family linkages: A guide for research and policy and program planning in the U.S. Military." Paper presented at the Annual USAF Family Support Center Director/Deputy Director Training Program, Montgomery, AL.

(1985, November). "Expanding the vision of the graduate and undergraduate family science curriculum." Paper presented at the National Council on Family Relations Annual Meeting, Dallas, TX.

(1985, May). "Establishing a domestic violence surveillance system: Implications for prevention." Paper presented at the Eight National Symposium on Building Family Strengths, Lincoln, NE (with Andrea Sedlak and Gerald T. Hotaling).

(1984, November). "The study of the adaptation of adolescents to independence and community life." Paper presented at the Fourth National Conference on Research, Demonstration, and Evaluation in Public Social Services, Washington, DC. (with Ronna Cook).

(1984, October). "Intercultural marriages in the military: Situation and support needs." Paper presented at the National Council on Family Relations Annual Meeting, San Francisco, CA.

(1984, October). "Alternative career strategies for family professionals." Paper presented at the National Council on Family Relations Annual Meeting, San Francisco, CA.

(1983, November). "Families in blue: Trends and dynamics of Air Force family life." Paper presented at the National Association of Social Workers Professional Symposium, Washington, DC.

(1983, October). "The Family Support Center Model: Integrating family, community, and work." Paper presented at the National Council on Family Relations Annual Meeting, St. Paul, MN.

(1983, October). "Research concerning military families." Paper presented at the Pre-Conference Military Family Workshop, National Council on Family Relations Annual Meeting, St. Paul, MN.

(1983, October). "Linkages: The Father-Child Relationship in the Military." Paper presented at the National Council on Family Relations Annual Meeting, St. Paul MN.

(1982, October). "An evaluation of U.S. Air Force pilot family support centers." Paper presented at the 1982 Joint Meeting of Evaluation Research Society and Evaluation Network, Baltimore, MD.

(1982, October). "Intercultural marriages in the military: A comparative analysis." Paper presented at the National Council on Family Relations Annual Meeting, Washington, DC.

(1982, October). "Military fathers: Implications for social policy." Paper presented at the National Council on Family Relations Annual Meeting, Washington, DC.

(1982, October). "Career Opportunities in the eighties." Paper presented at the National Council on Family Relations Annual Meeting, Washington, DC.

(1981, November). "Family patterns of U.S. military personnel." Paper presented at the Pre-Symposium Military Family Institute, National Association of Social Workers Bi-Annual Meeting, Philadelphia, PA.

(1981, October). "Air Force family stress: Implications for Air Force Chaplains." Paper presented at the Air Force Command Chaplain Conference, Albuquerque, NM.

(1981, October). "Sex-role preferences and marital quality in the Air Force." Paper presented at the National Council on Family Relations, Milwaukee, WI.

(1980, October). "Attitudes toward family enrichment and support programs among military families." Paper presented at the National Council on Family Relations, Portland, OR.

### Regional

(1997, February). "Academic resiliency among students 'at risk' of school failure: A longitudinal analysis." Paper presented at the Southeastern Conference on Family Relations, Chapel Hill, NC. (with Natasha Bowen)

(1996, April). "The school success profile: An example of action-oriented research." Invited Plenary Presentation, 1996 Quint State Symposium on Child and Family Development, The University of North Carolina at Greensboro, Greensboro, NC.

(1981, March). "Sex-role preferences and marital quality: Implications for clinical practice and programming." Paper presented at the Southeastern Conference on the Family and the Child, Blacksburg, VA.

(1980, April). "Social Network and the maternal role satisfaction of formerly married mothers." Paper presented at the Southeastern Conference on the Family and the Child, Greensboro, NC.

State

(2009, February). "The North Carolina Support and Resiliency Inventory: Developing State Partnerships for Funding." Invited presentation at the February 2009 meeting of the Governor's Focus on Returning Combat Veterans and their Families. Raleigh, NC. (with Jack Richman)

(2007, December). "Considering the Big Picture: Educational Excellence in North Carolina." Invited panel presentation at the 2007 North Carolina Summit on Youth and Families, NC State University, Durham, NC. (Organized by Karen Debord and Ed Maxa with Sam Houston and James Zuiches as fellow panel members).

(2006, July). "Linking Research to Practice." Invited closing presentation for the Family-School Relations during Adolescence: Linking Interdisciplinary Research and Practice, at Duke University, which was funded by the National Science Foundation and the American Psychological Association. (Professors Nancy Hill and Ruth Chao, Organizers)

(2005, April). "The School Success Profile Learning Organization Measure: A Case Study of Instrument Development." Paper presented at the Annual Meeting of the North Carolina Association for Research in Education. (with William B. Ware and Roderick A. Rose)

(2003, March). "Address the Achievement Gap through School Violence Prevention Programs." Paper presented at the Closing the Achievement Gap Conference, Greensboro, NC. (with Joelle D. Powers)

(2002, November). "Evaluating the effectiveness of the School Success Profile (SSP) on School- and Student-Level Performance." Invited Presentation to Spencer Seminar Group, Duke University.

(2002, June). "The Nature of Change: Lessons Learned." Invited plenary presentation at the Inspiring the Next Generation of Social Workers: Geriatric Enrichment in Social Work Education, Chapel Hill, NC: Carolina Meadows Continuing Care Retirement Community.

(2002, April). "Using Results Management and Community Capacity Building Strategies to Close the Achievement Gap." Paper presented at the Closing the Achievement Gap Conference, Greensboro, NC. (with Dennis K. Orthner)

(2002, April). "The Elementary School Success Profile (ESSP): Using Innovative Assessment Strategies to Improve Schools and Raise Achievement of all Students." Paper presented at the Closing the Achievement Gap Conference, Greensboro, NC. (with Natasha K. Bowen and Michael Woolley)

(1996, September). "Families and the Educational Resilience of Adolescents 'At Risk' of School Failure." President's address presented at the 1996 Family Council of North Carolina Annual Conference, Chapel Hill, NC.

(1993, February). "School success: The Family connection." Invited paper presented at the 1993 North Carolina Cities in School Conference. Research Triangle Park, NC (with Jack Richman and Jennifer McKay).

(1992, May). "Essentials for a successful marriage." Invited paper presented at the 1992 Eloise S. Cofer Family Living Seminar, North Carolina State University.

(1992, February). "Essentials for a successful marriage." Plenary speaker for the National Prayer Breakfast, Pope Air Force Base, NC.

(1991, February). "Structural shifts in the American economy and homelessness." Invited paper presented at the North Carolina's homeless families conference: Issues for the 90's. Raleigh, NC.

(1988, May). "Understanding the dynamics of family strength." Paper presented at the Stress and the Family Conference, Charlotte, NC.

(1988, May). "Family stress, coping, and social support." Invited Plenary Speaker, Stress and the Family Conference, Charlotte, NC.

(1986, February). "Family life in the military: Implications for social work practice." Plenary presentation at the Conference on Serving Military Families, Fayetteville, NC.

(1982, January). "Changing sex roles in the family." Paper presented at Second Annual Art of Family Living Seminar, Greensboro, NC.

UNC School of Social Work (2006 to present)

(2009, October). "Jordan Institute for Families: Military Members, Veterans, and their Families." Presentation to UNC School of Social Work Board of Advisors.

(2006, October). "The Unit Assets Inventory: A Web-based practice tool for strengthening social support systems for United States Air Force members and their families." Invited "For Your Information" (FYI) lunch-time presentation.

**WORKSHOPS CONDUCTED (1980 to PRESENT):**

International

(2006, May). "The Unit Assets Inventory." Series of workshops conducted at the 2006 Airman and Family Readiness Flight (AFRF) Flight Chief Training Summit, San Antonio, TX. (Attendance by AFRC Flight Chiefs from worldwide locations)

(2005, October). "Unit Community Readiness Strategy Implementation." Three-day train-the-trainer workshop with 28 USAFE Family Support Center Directors and Community Readiness Consultants conducted at Sembach Air Base, Germany, by Gary Bowen and James Martin. (12-14 October 2005)

(1996, July). "Youth relocation in the U.S. Air Force." One-day workshop conducted at Hickham Air Force Base, Hawaii, by Gary Bowen and Katie Coolbaugh with 60 teenage youth from eight PACAF installations.

(1986, April). "Toward a System of Program Development and Evaluation for Family Support Centers in the U.S. Air Force." Two-day workshop directed by author at the PACAF Family Support Center Conference, Tokyo, Japan (Supported by the Military Family Support Center, Springfield, VA.).

(1982, March). "Companionship and family recreation in the Air Force: Implications for youth directors." Workshop directed by author at USAFE Youth Directors Conference, Lakenheath, England and Berlin, Germany (Supported by the Family Activities Branch, United States Air Force, San Antonio, TX).

(1982, March). "Stress and stability in the Air Force family." Paper presented at seminar directed by author at Tempelhof Air Base, Berlin, Germany.

(1981, April/May). "Quality of Air Force Family Life: Research findings." Report presented at Clark Air Base, Manilla, PI; Kadena Air Base, Okinawa, Japan; Yokota Air Base, Tokyo, Japan; Osan Air Base, Osan, Korea; Kunsan Air Base, Kunsan, Korea; Taegu Air Base, Taegu, Korea (Supported by the Air Force Office Chief of Chaplains, Washington, DC).

National

(2012, April 24), "Gap analysis," 2012 National Guard Bureau Professional Development Seminar, Atlanta, GA.

(2009, August). "Resiliency and community partnerships in the shadows of war: Implications for policy and practice. Delivered at the Army OneSource Advanced Institute on Building Community Partnerships, and sponsored by The University of North Carolina at Chapel Hill (Citizen-Soldier Support Program). Honolulu, HA.

(2008, December). “Resiliency and community partnerships in the shadows of war: Implications for policy and practice. Delivered at the Army OneSource Advanced Institute on Building Community Partnerships, and sponsored by The University of North Carolina at Chapel Hill (Citizen-Soldier Support Program). Orlando, FL.

(2008, May, August, September). “Partnering with schools.” Series of training consultations with service providers from the U.S. Army, Air National Guard, Army Reserve on effective strategies for partnering with schools. Delivered at the advanced institute on behalf of the Army Integrated Family Support Network and the University of North Carolina at Chapel Hill (Citizen-Soldier Support Program). Chapel Hill, NC.

(2008, April). “Moving Forward as a Learning Organization.” One-half day training with faculty and staff, Durham Nativity School, Durham, NC.

(2007, May). “Unit Assets Inventory.” One-half day training with Seymour Johnson Air Force Base Airman & Family Readiness Center, Goldsboro, NC.

(2007, April). “Unit Assets Inventory.” Plenary Presentation at the Airman & Family Readiness Qualification “Pilot” Course, San Antonio, TX. (Supported by AFPC/DPSOF & AF/A1SF)

(2006, December). “Training update on the Communities in Blue Website with AF/A1DF leadership and USAF MAJCOM Flight Chiefs,” 2006 Worldwide Manpower & Personnel Conference Delivering America’s Airmen Today and Tomorrow, San Antonio, TX.

(2006, June). “Two-day training and consult with Travis AFB Family Support Center staff on using the Unit Assets Inventory for Intervention Planning.” Travis AFB, CA.

(2006, June). “One-day training with Scott AFB Family Support Center staff on working as a Learning Organization.” Scott AFB, IL.

(2006, March). “Air Force Community Readiness Leadership Training.” One-day training workshop with Air Combat Command Family Support Center staffs from Nellis and Beale AFBs at Nellis Air Force Base, NV. In conjunction with Shipley Communications (David Graff).

(2005, December). “Integrating the Community Readiness Consultant Model Using the Unit Assessment Inventory.” One-day training workshop with Air Mobility Command Family Support Center Directors at Scott AFB, IL.

(2005, November). “The Unit Assets Inventory.” Half-day training briefing to United States Air Force Family Support Center Major Command Chiefs, San Antonio, TX.

(2004, November). “Assisting AF Members and Civilians, their Families, and Communities to Thrive and Successfully Manage the Demands of Military Life.” Two-day workshop with Integrated Delivery Team Members at Schriever Air Force Base, CO.

(2004, October). “Community Readiness Strategy Platform Review.” One-day workshop sponsored by United States Air Force Europe at the Strengthening the Home Front Air Force Family Matters Conference, The National Conference Center, Lansdowne, VA.

(2004, October). “The Communities in Blue Website.” One-half day workshop sponsored by United States Air Force Space Command at the Strengthening the Home Front Air Force Family Matters Conference, The National Conference Center, Lansdowne, VA. (with James A. Martin & Michael Kelly)

(2001, May). “Building Community Capacity: A Results Management Approach.” Two-day workshop sponsored by the Family Support Center, Dover Air Force Base, DE.

(2001, April). "Building Community Capacity: A Results Management Approach." Two-day workshop sponsored by the Family Support Center, McGuire Air Force Base, NJ.

(2001, March). "Forging Community Partnerships in Air Force Communities." Three-day workshop sponsored by the U.S. Air Force Family Matters Office, Air Mobility Command, MacDill Air Force Base, FL.

(2000, January). "Building Community Capacity: A Results Management Approach." Two-day workshop sponsored by the Family Support Center, McChord Air Force Base, WA.

(2000, October). "Building Community Capacity: A Results Management Approach." Two-day workshop sponsored by the Family Support Center, Pope Air Force Base, NC.

(2000, October). "Building Community Capacity: A Results Management Approach." Two-and-one-half day workshop sponsored by the Family Support Center, Travis Air Force Base, CA.

(2000, August). "Building Community Capacity: A Results Management Approach." Two day workshop sponsored by the Family Support Center, Fairchild Air Force Base, WA.

(2000, July). "Air Force Needs Assessment Results Management Training." One-day workshop conducted with Integrated Delivery Systems Teams at Scott AFB, MO, Travis AFB, CA, Eielson AFB, AK; & Elmendorf AFB, AK.

(1999, March). "Building Community Capacity: A Results Management Approach." Two-and-one-half day workshop sponsored by the Family Support Center, Travis Air Force Base, CA.

(1999, February). "Building Community Capacity: A Results Management Approach." Two-day workshop sponsored by the Family Support Center, Charleston Air Force Base, SC.

(1999, February). "Building Community Capacity: A Results Management Approach." One-day workshop sponsored by the Alliance for Children and Families, Community-Centered Initiatives (CCI) Program, Atlanta, GA.

(1999, February). "Building Community Capacity through Results Management Principles and Concepts." One-day training program presented at the United States Air Force Services Millennium 2000 Conference, Langley Air Force Base, VA. (with Dennis K. Orthner)

(1998, August). "Results Management." One week training program presented to family support center directors from the Air Mobility Command, U.S. Air Force, McChord Air Force Base, Tacoma, WA.

(1998, July). "Building Community Capacity: An Example of Results Management." Plenary presentation given at the Worldwide Conference on Family Advocacy, U.S. Army, Salt Lake City, UT.

(1998, March). "Social Capacity: The Target of Performance Based Management." Workshop presented to Air Force family advocacy teams, Worldwide Family Advocacy Conference, New Orleans, LA.

(1998, February). "Theory, Application, and Mechanics of Using Outcome Measures in AMC Family Support Centers to Assess Program Effectiveness and Project Future Needs." One-half day workshop presented at Nellis Air Force Base, Las Vegas, NV.

(1997, October). "Crime & Violence: How It Affects America's Youth." One-half day workshop presented at the Communities In Schools Multi-Track Training Conference, Detroit, MI. (with Dr. Jack Richman)

(1997, June). "Performance Based Management." Plenary presentation at 1997 Army Community Service worldwide conference, Department of Army, San Antonio, TX.

(1997, January). "Performance Based Management in Family Advocacy." Plenary presentation at 1997 FAP Annual Training Conference, "Evaluation: Targeting Excellence: Measuring Outcomes." Sponsored by the Community and Family Support Center, Department of the Army, San Diego, CA.

(1996, June). "Closing the Gap Between Service Needs and Service Response." One-day workshop for all directors of Army Community Service worldwide. Sponsored by the Army Community and Family Support Center, Phoenix, AZ.

(1996, March). "The School Success Profile," Plenary Presentation, Communities in Schools of Georgia Executive Directors' Consortium Meeting, Columbus, GA. (with Dr. Jack Richman)

(1995, September). "The Unit Services Concept." One-day workshop presented at the Annual Air Force FSC Directors Training Conference, Air University by invitation of the Chief of Training, Office of Family Matters, Department of the Air Force, Montgomery, AL.

(1994, June). "The ACS Unit Program Initiative." Two-week workshop for all directors of Army Community Service worldwide. Sponsored by the Army Community and Family Support Center and The University of California at Riverside, San Ana, CA. (1/2 day workshop on Program Monitoring).

(1994, January). "The ACS Unit Pilot Program." Three-day workshop for directors of Army Community Service from nine installations worldwide. Sponsored by the Army Community and Family Support Center, Research Triangle Park, NC. (with Dennis K. Orthner, Jay A. Mancini, & Samuel B. Pond)

(1993, September). "Work and Family Linkages: Implications for Service Delivery." One-day workshop presented at the Annual Air Force FSC Deputy Directors Training Conference, Air University by invitation of the Chief of Training, Office of Family Matters, Department of the Air Force, Montgomery, AL.

(1992, November). "Essentials for a Successful Relationship," "Family Stress, Coping, and Social Support," and "Navigating the Marital Journey." Three seminars conducted under sponsorship from Loring Air Force Base through the University of Maine Cooperative Extension, Orono, ME.

(1992, October). "Is your Program Making a Difference: The Fundamentals of Outcome and Impact Evaluation." One-day workshop presented at the Southeastern Cities-in-Schools Annual Meeting, Atlanta, GA.

(1992, June). "Building Strong Relationships in the U.S. Military: Implications for Service Delivery." One-day workshop presented at the Annual Air Force FSC Deputy Directors Training Conference, Air University by invitation of the Chief of Training, Office of Family Matters, Department of the Air Force, Montgomery, AL.

(1991, October). "Family Support: An Essential Component in the Organizational Success Equation." Plenary Presentation at the Department of the Air Force, Headquarters, Military Airlift Command, on Family Support and Enrichment Conference, St. Louis, MO.

(1991, October). "The Marital Assessment Profile: MAP—A Support Program for Couples." One-half day workshop presented at the Department of the Air Force, Headquarters, Military Airlift Command, on Family Support and Enrichment Conference, St. Louis, MO.

(1991, August). "Family Adaptation in the U.S. Air Force: Implications for Service Delivery." One-day workshop presented at the Annual Air Force FSC Deputy Directors Training Conference, Air University by invitation of the Chief of Training, Office of Family Matters, Department of the Air Force, Montgomery, AL.

(1990, June). "Organizational Culture in the U.S. Military: Implications for Family Adaptation and Service Delivery." One-day workshop presented at the Annual Air Force FSC Deputy Directors Training Conference, Air

University by invitation of the Chief of Training, Office of Family Matters, Department of the Air Force, Montgomery, AL.

(1990, April). "The Work Culture of Parents and Child Development." One-day Workshop conducted for Cardinal Mental Health Group, Inc, Fayetteville, NC.

(1990, April). "Organizational Culture in the U.S. Military: Implications for Family Adaptation and Service Delivery." Two-day workshop presented at the Annual Air Force FSC Training Conference, Air University by invitation of the Chief of Training, Office of Family Matters, Department of the Air Force, Montgomery, AL.

(1989, March). "The History and Concept of the Family Support Center in the U.S. Air Force"; "Air Force Demography and Needs Assessment in the History of the Family Support Center"; "Family Stress, Coping and Social Support: The Role of the FSC." Three workshops presented at the Annual Air Force FSC Training Conference, Air University, by invitation of the Chief of Training, Office of Family Matters, Department of the Air Force, Montgomery, AL.

(1988, July). "The History and Concept of the Family Support Center in the U.S. Air Force." Workshop presented at the Annual Air Force FSC Training Conference in Montgomery, AL by invitation of the Chief, Office of Family Matters, Department of the Air Force, Washington, DC.

(1987-1988). "The Marital Assessment Profile (MAP): Implications for Family Life." Three workshops (October, 1987; January 1988; October, 1988) presented by invitation to three cohorts of 20 corporate families at E.I. Dupont, Wiring and Cable Division, Wilmington, DE.

(1987, September). "Toward an Understanding of the Organizational and Family Interface." Presentation made by invitation from Headquarters Marine Corps to commanders at three bases: Parris Island, S.C., Cherry Point, NC, and Camp Lejeune, NC.

(1987, July). "The History and Concept of the Family Support Center in the U.S. Air Force"; "An Application of Systems' Theory to the Operation and Management of a Family Support Center"; "Community Assessment: Theory and Function." Three workshops presented at the Annual Air Force FSC Training Conference by invitation of the Chief of the Office of Family Matters, Department of the Air Force, Montgomery, AL.

(1987, April). "Community Needs Assessment." One half-day workshop conducted at the Second Tactical Air Command Family Support Center Training Conference, Homestead Air Force Base, Miami, FL.

(1986, November). "The Family Support Center Program: A Workshop in Strategic Planning for the 1990's." One day workshop conducted with the staff of the Office of Family Matters, Department of the Air Force, Crystal City, VA. (Associate Trainers: Mr. Gerald M. Croan and Dr. Dennis K. Orthner)

(1986, July). "The Fundamentals of Systems Theory: Implications for Service to Air Force Families." One day workshop directed by author at the Air Force Family Support Center New Directors and Deputy Directors Training Program, Montgomery, AL. (Supported by the Military Family Support Center, Springfield, VA.)

(1986, July). "The Art and Science of Needs Assessment and Program Planning and Development in the U.S. Air Force." One-day workshop directed by author at the Air Force Family Support Center New Director and Deputy Director Training Program, Montgomery, AL. (Supported by the Military Family Support Center, Springfield, VA)

(1985, May). "Sample Weighting: Strategies and Issues." Workshop presented with Mr. Hal Nisselson to the research staff at the Army Research Institute, DARCOM Headquarters, Alexandria, VA.

(1984, April). "The Development of the USAF Family Support Program: Lessons for Social Work Practice and Education." Colloquium held with the University of North Carolina at Chapel Hill School of Social Work Faculty.

(1983, August). "Responding to Abuse and Neglect in the Military Community: Alternative Service Models." Workshop held with Marine Corp Family Service Directors, Washington, DC.

(1982, June). "Critical Areas of Family Ministry." Workshop directed by author for Air Force Chaplains at Hickman Air Force Base, Honolulu, HI.

(1982, April). "Single Parents in the Air Force: Trends and Dynamics." Workshop directed by author at the Air Force Family Conference, Los Angeles, CA.

(1982, April). "Helping Working Parents: Child Care Options." Workshop directed by author at the Air Force Family Conference, Los Angeles, CA.

#### State

(2001, December). "Closing the Achievement Gap: A Results Management Approach." One Day Continuing Education Workshop sponsored by the School of Social Work, The University of North Carolina at Chapel Hill, Chapel Hill, North Carolina. (with Dennis K. Orthner)

(2000, September). "Community Development: A Results Management Approach." One Day Workshop sponsored by the Durham Youth Coordinating Board, Durham, NC. (with Dennis K. Orthner)

(2000, August). "Building and Sustaining Community Capacity in Support of Military Families." Annual Children's Services State of the Art Conference, Atlantic Beach, NC. (sponsored by Eastern AHEC)

(2000, June). "The School Success Profile (SSP): Designing Interventions that Promote Academic Achievement." Bridging Frameworks for Positive Youth Development, Wilmington, NC. (with Jack Richman)

(2000, June). "Community Development: A Results Management Planning Process." Bridging Frameworks for Positive Youth Development, Wilmington, NC. (with Dennis Orthner)

(2000, June). "Issues in Community Assessment: A Results Management Approach," Presentation at the Safe Communities 2000 Conference, Governor's Crime Commission, Durham, NC.

(1998, January). "Measuring Impact and Tracking Results," The Governor's Summit on America's Promise and Volunteerism, Greensboro, NC. (with Jack Richman, Susan Brown, & Rosalyn Jacobs)

(1997, February). "Accountability in the Public Schools," Presentation at the 1997 Communities In School Exchange, Pinehurst, NC. (with Natasha Bowen)

(1996, October). "The School Success Profile," Communities In Schools of Georgia Annual Conference, Atlanta, GA. (with Jack Richman)

(1996, February). "The School Success Profile," Communities in Schools of North Carolina Annual Conference, Raleigh, NC.

(1994, September). "Accountability: Principles for Innovation." Member of panel to discuss a template for developing effective programs in North Carolina, The Family Council of North Carolina Annual Conference, Chapel Hill, NC.

(1990, March). "Family Stress, Coping, and Social Support." Workshop presented at the NASW Spring Conference, Families in the 90's: Preparing for the 21st Century, Raleigh, NC.

(1990, February). "Corporate Supports for Families: The Spouse Program at E.I. DuPont." Workshop presented at the North Carolina Family Life Council Annual Meeting, Focusing on Families in North Carolina: Health & Policy Issues, Raleigh, NC.

(1989, April). "Military Influences on Mental Health." Workshop presented for the Eastern Regional Area Health Center conference on Cultural Influences: The Impact on Mental Health, Brody Medical Sciences Building, Greenville, NC.

(1988, October). "Needs Assessment, Program Planning and Evaluation." Workshop presented at the 67th Social Services Institute, Asheville, NC.

(1988, May). "Understanding the Dynamics of Family Strength." Workshop presented at the Stress and Family Conference, University of North Carolina at Charlotte, Charlotte, NC.

(1987, June). "The Work-Family Interface: Family Adaptation in the U.S. Marine Corps." Presentation made by invitation to commanders and first sergeants at El Toro Marine Corps Air Station, Santa Ana, CA.

(1987, May). "The Contribution of Families to the Mission: Toward an Understanding of the Work-Family Interface in the U.S. Marine Corps." Presentation made by invitation to commanders and first sergeants at Camp Lejeune Marine Corps Base, Jacksonville, NC.

(1986, October). "Family Systems: Strategies for Intervention." Half-day workshop presented at the 65<sup>th</sup> Social Services Institute, Raleigh, NC.

(1986, February). Co-coordinator with Dr. Bill Saur and Ms. Patricia Sipp and plenary speaker of a one-day conference sponsored by the School of Social Work and HSA Cumberland Hospital at the Holiday Inn in Fayetteville, NC entitled, "Serving Military Families: An Emerging Area of Social Work Practice." National military leaders served as invited panelists and over 180 civilian and military social workers from Eastern North Carolina attended this conference.

(1982, January). "Changing Sex Roles in the Family." Workshop directed by author at the Second Annual Art of Family Living Seminar, Greensboro, NC.

(1982, September). "The Situation and Needs of Air Force Families: Implications for service." Workshop directed by author at Pope Air Force Base, Fayetteville, NC.

#### Local

(1988, January). "Values: A Basis for Understanding Relationship Strength and Stress." Workshop presented at Westminster Presbyterian Church, Durham, NC.

(1986, May). "Organization and Family Linkages in the Military Community: Implications for Social Work Practice." Workshop presented for the Pediatric Social Work Staff at North Carolina Memorial Hospital, Chapel Hill, NC.

#### **TRAINING:**

##### International

(2014, January). Air Force Community Action Planning. Results-focused planning via the web for Integrated Delivery System members at every AF base worldwide in using results from the 2014 Community Assessment for responding to priority issues of service members and their families. (With Ipsos Public Affairs in Washington, DC and sponsored by the HQ Department of the Air Force).

(2008, April). "School Success Profile: Administration, Interpretation, and Application." Four-day training program for group from Romania at School of Social Work, The University of North Carolina at Chapel Hill (Lead Delegate: Dr. Maria Roth).

(2005, October). "Community Readiness for Air Force Family Support Center Staff: Train-the Trainers." Three-day train-the-trainers instruction for 28 FSC Flight Chiefs and Team Leads in USAFE at Sembach Air Base, Germany. (Supported by USAFE A1PM Family Matters).

(1984, January). "Conducting Mail Surveys: A Training Program for Survey Coordinators." Two-day training program conducted at Bitburg Air Base, Germany and Hahn Air Base, Germany. (Supported by Air Force Office of Family Matters, Washington, DC)

(April-May, 1981). "Issues in Survey Research: A Training Program for Conducting Personal Interviews." One-day training program conducted at Hickam Air Force Base, Hawaii; Clark Air Base, Philippines; Kadena Air Base, Japan; Yokota Air Base, Japan; Osan Air Base, Korea; Kunsan Air Base, Korea; Taegu Air Base, Korea. (Supported by Office of Chief of Chaplains, United States Air Force, Washington, DC).

### National

(2008, September). "Resiliency and Community Partnerships in the Shadows of War: Implications for Policy and Practice." Plenary presentation at the Army Integrated Family Support Network Advanced Institute on Building Community Partnerships." Chapel Hill, NC: Citizen-Soldier Support Program.

(2000, December). "Community Capacity Training Model." Five-day train-the-trainers program with Air Force human service leaders. Chapel Hill, NC.

(1998, August). "Results Management II." Two and one-half day training program with Air Force Family Support Center Directors from the Air Mobility Command, Chapel Hill, NC.

(1998, August). "Results Management I." Three and one-half day training program with Air Force Family Support Center Directors from the Air Mobility Command, McChord AFB, Washington.

(1997, July). "School Success Profile Train-the-Trainers." Communities In Schools Multi-Track Training Conference, Lehigh University, Bethlehem, PA. (with Jack M. Richman)

(1985, September). "Community Practice Intervention for Families Under Stress." One-day training program conducted with Air Force Family Support Center Directors, Los Angeles, CA. (Contracted through the Air Force Office of Family Matters, Washington, DC).

(1985, August). "Toward an Understanding of Family Systems and Dynamics: Implications for Community Intervention." One-day training program conducted with the Air Force Family Support Center Directors, Plattsburgh, NY. (Contracted through the Air Force Office of Family Matters, Washington, DC).

(1982, September). "Navy Family Life: Trends and Dynamics." Two-day training program conducted with Navy Family Service Center Directors, Washington, DC. (Supported by Military Family Resource Center, Springfield, VA)

(1981, June). "How to Conduct an Effective Needs Assessment and Program Evaluation." One-day training program conducted with Air Force Family Support Center Directors, Family Renewal Center, Minneapolis, MN. (Supported by the Office of Family Matters, United States Air Force, Washington, DC).

(April - May, 1981). "Toward and Understanding of Air Force Family Life." Three-week training program conducted with Air Force Family Support Centers Directors, Greensboro, NC. (Supported by the Office of Family Matters, United States Air Force, Washington, DC).



THE UNIVERSITY  
of NORTH CAROLINA  
at CHAPEL HILL

CAROL L. FOLT  
Chancellor

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## Mail Ballot

### Board of Trustees

August 4, 2016

Attached for your review and approval is a memo concerning the terms of appointment and compensation for Gary Bowen as Dean of the School of Social Work. This mail ballot will be approved as part of the consent agenda at the full board meeting on Thursday, September 22, 2016.

The undersigned votes as follows with respect to the recommendation proposed in Chancellor Folt's memorandum dated August 4, 2016

	Approve	Disapprove
Appointment and compensation for Gary Bowen as Dean of the School of Social Work	<input type="checkbox"/>	<input type="checkbox"/>

Signature\_\_\_\_\_

Printed Name\_\_\_\_\_

Date\_\_\_\_\_

Please fax to TJ Scott at (919) 962-1647 or email at [tj\\_scott@unc.edu](mailto:tj_scott@unc.edu)

This mail ballot was approved by majority vote on August 4, 2016 by the following: Haywood Cochrane, Chuck Duckett, Lowry Caudill, Jeff Brown, Julia Grumbles, Kelly Hopkins, Bill Keyes, Allie Ray McCullen, Ed McMahan, Hari Nath, and Bradley Opere.



THE UNIVERSITY  
of NORTH CAROLINA  
at CHAPEL HILL

## ATTACHMENT B

**CAROL L. FOLT**  
*Chancellor*

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### **MEMORANDUM**

**TO:** Members of the Board of Trustees  
**FROM:** Carol L. Folt  
**RE:** Mail Ballot  
**DATE:** August 25, 2016

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You have authorized my office to poll you by mail concerning personnel matters which require attention by the Board. Accordingly, we are transmitting to you herewith personnel actions as follows:

EHRA Faculty Compensation & Tenure Actions

Attachment A

Please mark and return the enclosed mail ballot indicating whether or not you agree with the actions proposed. Thank you.

## EXECUTIVE SUMMARY

Board of Trustees

August 25, 2016

No.	College/Division	Name	Dept./School	Current Rank	New Rank	Tenure Request Reason	Effective Date	Salary
<b>Personnel Actions</b>								
<b>New Appointments without Tenure</b>								
1	Health Affairs	Catherine Coombs	Medicine	N/A	Assistant Professor		9/1/2016	\$180,000.00
2	Health Affairs	Leah Frerichs	Health Policy & Management	N/A	Assistant Professor		9/1/2016	\$115,000.00
3	Health Affairs	Sara Grace	Ophthalmology	Nominated Clinical Assistant Professor	Assistant Professor		8/26/2016	\$140,000.00
4	Health Affairs	Simon Khagi	Medicine/Neurosurgery	N/A	Assistant Professor		9/1/2016	\$210,000.00
5	Health Affairs	Michael Love	Biostatistics/Genetics	N/A	Assistant Professor		9/1/2016	\$120,000.00
6	Health Affairs	Sarah Nyante	Radiology	Nominated Research Assistant Professor	Assistant Professor		8/26/2016	\$95,000.00
7	Health Affairs	Gauri Rao	Pharmacy	N/A	Assistant Professor		8/31/2016	\$115,000.00
8	Health Affairs	Brandi Reeves	Medicine	Nominated Clinical Assistant Professor	Assistant Professor		9/1/2016	\$180,000.00
9	Health Affairs	Tracy Rose	Medicine	Nominated Clinical Assistant Professor	Assistant Professor		9/1/2016	\$180,000.00
10	Academic Affairs	Deborah Turner	SILS	N/A	Assistant Professor		1/1/2017	\$87,000.00
<b>Addition of Joint Appointment without Tenure</b>								
0								
<b>Promotion to Full Professor</b>								
1	Health Affairs	Anne Lyerly	Social Medicine	Associate Professor	Professor		10/1/2016	\$150,000.00
2	Health Affairs	Monte Willis	Pathology & Lab Medicine/Pharmacology	Associate Professor	Professor		9/11/2016	\$169,430.00
<b>Reappointments to the same Rank</b>								
1	Health Affairs	Chad Pecot	Medicine	Assistant Professor	Assistant Professor		10/1/2017	\$180,000.00
2	Health Affairs	Nathaniel Hathaway	Pharmacy	Assistant Professor	Assistant Professor		7/15/2017	\$114,332.00
<b>Designation/Reappointments to Departmental Chair</b>								
1	Health Affairs	Jainwen Cai	Biostatistics	Professor/Vice Chair	Interim Chair		7/1/2016	\$338,320.00
2	Academic Affairs	Edward Samulski	Applied Physical Sciences	Professor	Interim Chair		7/1/2016	\$125,000.00
3	Academic Affairs	Harvey Seim	Marine Sciences	Professor/Department Chair	Department Chair		7/1/2016	\$117,738.00
<b>Designation/Reappointments to Distinguished Professorship</b>								
1	Health Affairs	Ronald Falk	Medicine	Allan Brewster Distinguished Professor	Nan & Hugh Cullman Eminent Professorship		9/1/2016	\$450,000.00
<b>Actions Conferring Tenure</b>								
<b>Promotion Conferring Tenure</b>								
1	Academic Affairs	David Gotz	SILS	Associate Professor	Associate Professor	Promotion based on research, teaching, and service	1/1/2017	\$101,809.00
2	Health Affairs	Rebecca Santelli	Psychiatry	Assistant Professor	Associate Professor	Promotion based on excellence in research	8/26/2016	\$84,016.00
3	Academic Affairs	Ryan Shaw	SILS	Assistant Professor	Associate Professor	Promotion based on research, teaching, and service	1/1/2017	\$85,690.00
<b>New Appointments Conferring Tenure</b>								
0								
<b>Addition of Joint Appointment Conferring Tenure</b>								
0								
<b>Corrections</b>								
1	Academic Affairs	Mohit Bansal	Computer Science	N/A	Assistant Professor		1/1/2017*	\$105,000.00
2	Academic Affairs	Santiago Olivella	Political Science	N/A	Assistant Professor		1/1/2017*	\$85,000.00

## EXECUTIVE SUMMARY

## Board of Trustees

July 14, 2014

No.	College/Division	Name	School	Department	Rank	Reason	Requested Amount of Increase **	Percent of Increase **	June 30 Salary	Current Salary	New Salary *	Effective Date
<b>Compensation Actions</b>							** Based on cumulative increase(s) to 6/30 salary					
1	Academic Affairs	Janice Anderson	Education		Assistant Professor	Increase due to promotion to Associate Professor with tenure	\$14,395	19.90%	\$72,345	\$72,345	\$86,740	7/1/2016
2	Health Affairs	Clare Barrington	Public Health	Health Behavior	Assistant Professor	Increase due to promotion to Associate Professor	\$23,093	19.99%	\$115,507	\$115,507	\$138,600	7/1/2016
3	Academic Affairs	Gary Bowen	Social Work		Distinguished Professor	Increase due to new administrative appointment as Dean of the School of Social Work	\$44,577	19.35%	\$230,423	\$230,423	\$275,000	9/1/2016
4	Health Affairs	Amber Frick	Pharmacy	Pharmacotherapy and Experimental Therapeutics	Postdoc Research Associate	Increase due to new faculty appointment as Clinical Assistant Professor via external competitive event	\$73,000	173.81%	\$42,000	\$42,000	\$115,000	9/1/2016
5	Health Affairs	Seth Glickman	Medicine	Emergency Medicine	Associate Professor/Director	Increase due to new secondary administrative appointment as President of UNC Health Alliance	\$85,000	26.98%	\$315,000	\$315,000	\$400,000	9/1/2016
6	Health Affairs	Adam Gracz	Medicine	Genetics	Research Assistant Professor	Increase due to American Gastroenterological Association Research Foundation grant allowing for a salary increase	\$21,069	47.29%	\$44,556	\$52,500	\$65,625	7/1/2016
7	Health Affairs	George Holmes	Public Health	Health Policy Mgmt/Sheps Ctr	Associate Professor	Increase due to secondary administrative appointment as Director of the Sheps Center	\$38,815	21.42%	\$181,185	\$181,185	\$220,000	8/1/2016
8	Health Affairs	Elizabeth Kunreuther	Medicine	Psychiatry	Social/Clinical Research Assistant	Increase due to new faculty appointment as Clinical Instructor via internal competitive event	\$15,121	37.45%	\$40,379	\$40,379	\$55,500	9/1/2016
9	Health Affairs	Richard Moffitt	Medicine	Pharmacology	Postdoc Research Associate	Increase due to new faculty appointment as Research Assistant Professor via internal competitive event	\$10,784	19.89%	\$54,216	\$54,216	\$65,000	9/1/2016
10	Health Affairs	Brett Murdock	Medicine	Radiology	Clinical Fellow	Increase due to new faculty appointment as Clinical Assistant Professor via internal competitive event	\$167,831	293.57%	\$57,169	\$57,169	\$225,000	7/1/2016
11	Health Affairs	Benjamin Philpot	Medicine	Cell Biology & Physiology	Distinguished Professor	Increase due to new secondary administrative appointment as Co-Director of the UNC Neurosciences Center; this is part of a retention package	\$35,000	15.91%	\$219,954	\$252,929	\$254,954	8/1/2016
12	Health Affairs	Jeremy Simon	Medicine	Genetics	Postdoc Research Associate	Increase due to new faculty appointment as Research Assistant Professor via external competitive event	\$15,200	19.05%	\$79,800	\$79,800	\$95,000	8/1/2016
13	Health Affairs	Barbara Turpin	Public Health	Environmental Sciences & Engineering	Professor	Increase due to secondary administrative appointment as Chair of the Department of Environmental Sciences and Engineering	\$31,000	19.38%	\$160,000	\$160,000	\$191,000	7/1/2016
14												
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No.	College/Division	Name	Department/School	Rank	Reason	Total Monetary Value of Non-Salary Compensation	Duration of Non-Salary Compensation	Effective Date	End Date
<b>Non-Salary Compensation Actions</b>									
0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	NA

*The University of North Carolina at Chapel Hill*  
**EXECUTIVE SUMMARY**  
*Board of Trustees*  
*July 14, 2014*

No.	College/Division Name	Department/School	Rank	Description
For Information				
0	N/A	N/A	N/A	N/A





THE UNIVERSITY  
of NORTH CAROLINA  
at CHAPEL HILL

**CAROL L. FOLT**  
*Chancellor*

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## Mail Ballot

### Board of Trustees

**August 25, 2016**

Chancellor Carol Folt submits for your review and approval the EHRA Faculty salary and tenure actions as recommended for August 2016. This mail ballot will be approved as part of the consent agenda at the Full Board meeting on Thursday, September 21, 2016.

The undersigned votes as follows with recommendation to these proposed actions as presented by the Chancellor.

	Approve	Disapprove
EHRA Faculty Salary Increases and Tenure Promotions (Attachment A)	<input type="checkbox"/>	<input type="checkbox"/>

Signature\_\_\_\_\_

Printed Name\_\_\_\_\_

Date\_\_\_\_\_

Please fax to TJ Scott at (919) 962-1647 or email at [tj\\_scott@unc.edu](mailto:tj_scott@unc.edu)

This mail ballot was approved by majority vote on August 29, 2016 by the following: Haywood Cochrane, Chuck Duckett, Jeff Brown, Julia Grumbles, Allie Ray McCullen, Ed McMahan, Hari Nath, and Bradley Opere.

## ATTACHMENT C

### **SITE APPROVAL – FETZER SOCCER/LACROSSE FACILITY AND INDOOR PRACTICE FACILITY**

This project will add a new soccer and lacrosse facility, associated grandstands, press box and team facilities. The indoor football practice facility will provide a turf field and associated support facilities for the Department of Athletics and will be shared by Campus Recreation.

The project budget is \$55 million and will be funded by the Educational Foundation.

The Chancellor's Buildings and Grounds Committee approved the site on September 1, 2016.

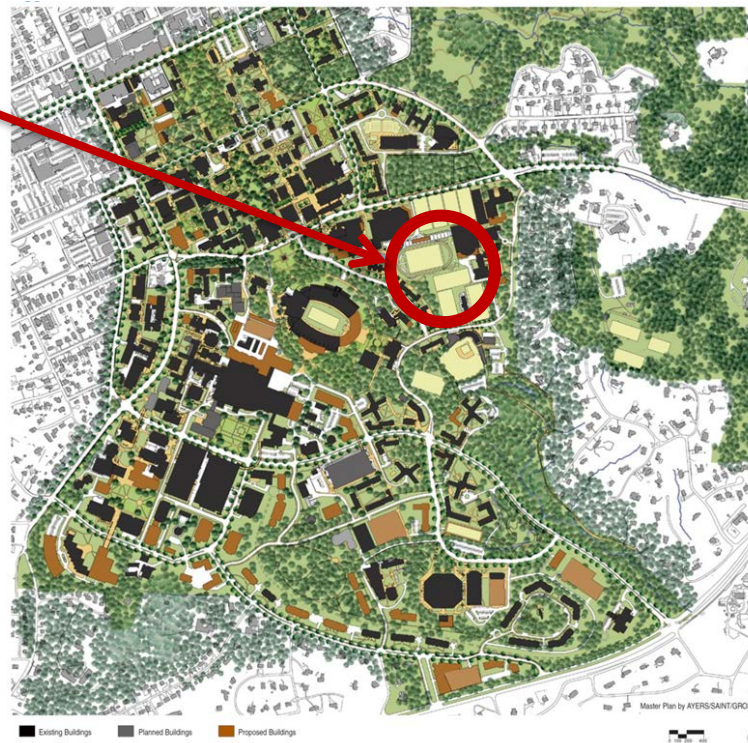
#### **RECOMMENDED ACTION:**

A motion to approve the site.



# Fetzer Soccer/Lacrosse Field & Indoor Practice Facility

PROJECT LOCATION



2006 CAMPUS MASTER PLAN



UNC  
DIVISION OF FINANCE  
AND ADMINISTRATION

Site Approval



# Fetzer Soccer/Lacrosse Field & Indoor Practice Facility



## **ATTACHMENT D**

### **SITE APPROVAL – CHASE HALL ADDITION**

This project will add approximately 5,000 SF to the existing Chase Hall dining facility at Rams Head and provide an additional 150-200 seats and food venue.

The project budget is \$3.8 million and will be funded by the Student Dining receipts.

The Chancellor's Buildings and Grounds Committee approved the site on September 1, 2016.

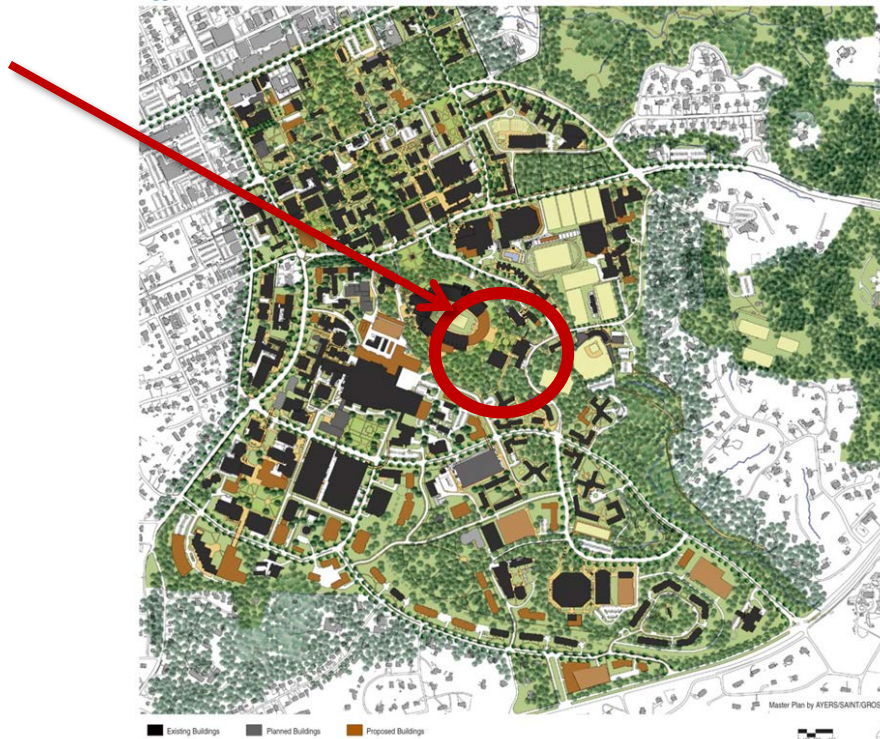
### **RECOMMENDED ACTION**

A motion to approve the site.



# Chase Hall Addition

PROJECT LOCATION



N

2006 CAMPUS MASTER PLAN



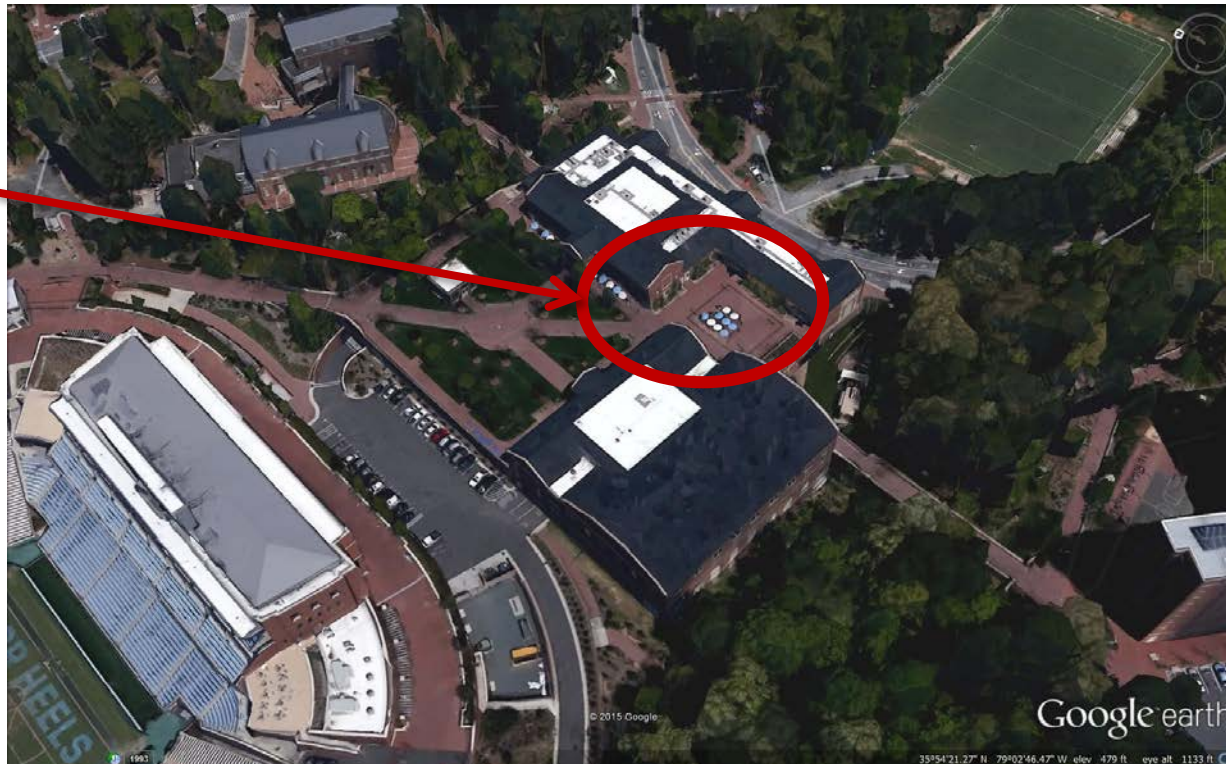
UNC  
DIVISION OF FINANCE  
AND ADMINISTRATION

Site Approval



# Chase Hall Addition

PROJECT SITE



AERIAL VIEW



UNC  
DIVISION OF FINANCE  
AND ADMINISTRATION

Site Approval

## **ATTACHMENT E**

### **APPROVAL FOR THE DEMOLITION OF FETZER FIELD, McCASKILL SOCCER CENTER AND BELK TRACK**

The demolition of the existing Fetzer Field, McCaskill Soccer Center and Belk Track is necessary for construction of the new Fetzer Soccer/Lacrosse Facility and the new Indoor Practice Facility.

The demolition project budget is \$1.2M and will be funded by The Educational Foundation.

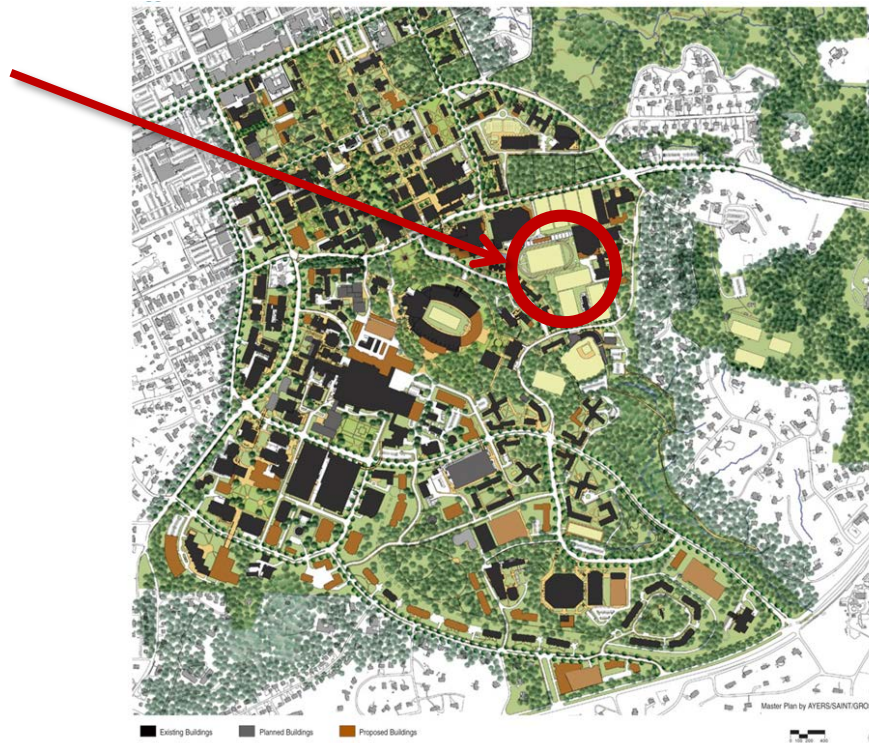
### **RECOMMENDED ACTION**

A motion to approve the demolition of existing Fetzer Field, McCaskill Soccer Center and Belk Track as described above.



# Demolition of Fetzner Field, McCaskill Soccer Center & Belk Track

FACILITY LOCATION



2006 CAMPUS MASTER PLAN



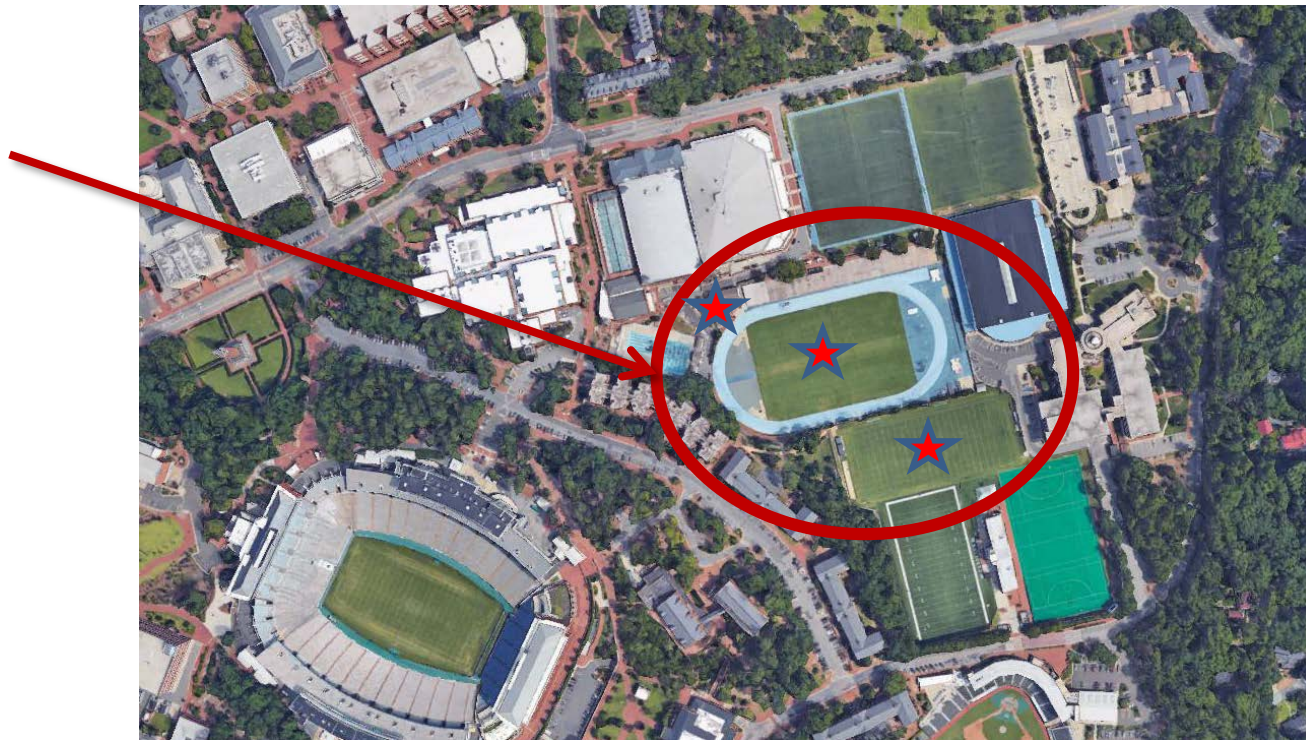
UNC  
DIVISION OF FINANCE  
AND ADMINISTRATION

Demolition Approval



# Demolition of Fetzner Field, McCaskill Soccer Center & Belk Track

PROJECT SITE



SITE PLAN



UNC  
DIVISION OF FINANCE  
AND ADMINISTRATION

Demolition Approval

## **ATTACHMENT F**

### **DESIGNER SELECTION – MEDICAL EDUCATION BUILDING**

This project will construct a 124,000 SF facility to provide a new building designed to meet the needs of modern medical education curriculum and enable the UNC Chapel Hill School of Medicine to increase enrollment by 30%, increasing class size from 180 to 230 students.

The project budget is estimated at \$90 million and will be funded by the Carolina Connect bond and gifts.

The project was advertised on June 9, 2016. Fifteen (15) proposals were received. Five (5) firms were interviewed on August 25, 2016. Members of the Board of Trustees did participate in the interviews.

The committee recommended the selection of the three firms in the following priority order:

- |                          |                 |
|--------------------------|-----------------|
| 1. Flad Architects/ SLAM | Raleigh, NC     |
| 2. BBH + HOK             | Raleigh, NC     |
| 3. Lord Aeck Sargent     | Chapel Hill, NC |

The firms were selected for their past performance on similar projects, strength of their consultant team and experience with medical education facilities.

### **RECOMMENDED ACTION**

A motion to approve the three firms in the following priority order:

- |                          |                 |
|--------------------------|-----------------|
| 1. Flad Architects/ SLAM | Raleigh, NC     |
| 2. BBH + HOK             | Raleigh, NC     |
| 3. Lord Aeck Sargent     | Chapel Hill, NC |

July 11, 2016

Flad Architects



Ms. Amy Dean, PE, PMP, LEED AP  
Project Manager  
The University of North Carolina at Chapel Hill  
Department of Facilities Planning & Design  
103 Airport Drive, Campus Box #1090  
Chapel Hill, NC 27599

434 Fayetteville Street  
Suite 1120  
Raleigh, NC 27601  
P 919 865-3523  
F 919 865-3529  
www.Flad.com

Re: Proposal for Design Services  
The Medical Education Building

Dear Ms. Dean and Members of the Selection Committee:

The Medical Education Building project will be transformational for UNC Chapel Hill. This new home for medical students will bring a renewed and exciting opportunity within the heart of the School of Medicine that will serve the long-range growth goals of the University. **Flad Architects and The S/L/A/M Collaborative (SLAM) have come together as a team to combine Flad's design excellence and deep understanding of the Chapel Hill campus with the depth of SLAM's medical education planning expertise.** Leadership at UNC Chapel Hill has deeply reflected on this project and have strong opinions and vision of the future state of the Medical Education Building. Our team has been engaged in the most recent space utilization and site location studies for this project, and we will build on and expand the work and current thinking done on the project, with the goal to develop a shared and clearly articulated vision. We believe the following issues are among the most important to understand:

- This project is about the students—the ways they will learn, interact, and build relationships with each other, as well as with instructors, mentors, and colleagues. The building must support the development of these relationships and provide a “professional home” with accommodations that are commensurate with the stature of the School of Medicine program.
- This is the opportunity to celebrate medical education through display and engagement, where interdisciplinary study is nurtured and students are encouraged to collaborate and make productive connections between subjects. Showcasing the work will enable UNC Chapel Hill to recruit and retain the best and brightest.
- Flexibility of space will support the future state of medical education with new and adaptable ways of learning and new technologies. We will explore smart ways to achieve this for the full program complement, including simulation spaces, anatomy, microbiology, and general instruction spaces.
- This is an important place on campus. The Medical Education Building is poised to invigorate the heart of campus and will be located at the intersection of major pedestrian pathways and exposure along South Columbia Street. Consideration of building scale and site topography and potential connectivity to adjacent buildings will be important influencers as we create a solution that is innovative and appropriate for the Chapel Hill campus.

We have assembled a highly qualified team that has addressed similar challenges on similar assignments, with outcomes of great success. Following is an overview of our team. Our full team is presented in detail beginning on page 16.

**Flad Architects will lead our team in the role of design architect, architect of record and planning for community spaces and non-technical program components.** We contribute national expertise with complex academic projects and a successful and award-winning history of creating meaningful educational environments that are contextually sensitive. Flad was involved in the recent space utilization planning study for this project, and we have enhanced our collective team's capabilities through partnering with SLAM.

**SLAM will lead the programming and planning for the medical education spaces, including the simulation suites.** Recognized as a national leader in planning and design of state-of-the-art facilities for medical education, we are active with national allied health and medical education organizations and frequently speak at national conferences on the planning and design of health education facilities, with a particular focus on the creative use of simulation and technology. Recent, relevant work is highlighted in this proposal and includes the newest medical education buildings at Duke University, Johns Hopkins, University of Texas and Emory University.

We have carefully reviewed the RFP and know the first step in the design process will be to assess the work done to date and develop a final space program and preliminary concept studies for the Medical Education Building. As the one team that combines continuity with the previous study and premier expertise in the planning and design of medical education facilities, we could not be more excited about this opportunity. Our mission is to challenge conventional thinking, explore and test new approaches, and develop creative solutions that deliver the most functional benefit for the dollar. We also recognize that UNC CH School of Medicine has a unique set of goals and culture, so we have tailored our project approach specifically to your needs.

We look forward to continuing the discussion about the Medical Education Building project.

Sincerely,

Chuck Mummert, AIA, LEED AP BD+C  
Principal-in-Charge  
Flad Architects

Robert Pulito, AIA  
President  
The S/L/A/M Collaborative

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATES PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		<b>20. EXAMPLE PROJECT KEY NUMBER</b> <div style="text-align: center; font-size: 2em;">1</div>				
<b>21. TITLE AND LOCATION (City and State)</b> <b>University of North Carolina at Chapel Hill, Koury Oral Health Sciences Building; Chapel Hill, North Carolina</b>		<b>22. YEAR COMPLETED</b> <table border="1"> <tr> <td>PROFESSIONAL SERVICES</td> <td>CONSTRUCTION <i>(If applicable)</i></td> </tr> <tr> <td>2012</td> <td>2012</td> </tr> </table>	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>	2012	2012
PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>					
2012	2012					
<b>23. PROJECT OWNER'S INFORMATION</b>						
<b>a. PROJECT OWNER</b> <b>University of North Carolina</b>	<b>b. POINT OF CONTACT NAME</b> <b>Jerry Guerrier</b>	<b>b. POINT OF CONTACT TELEPHONE NUMBER</b> <b>919.843.0849</b>				
<b>24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)</b>						

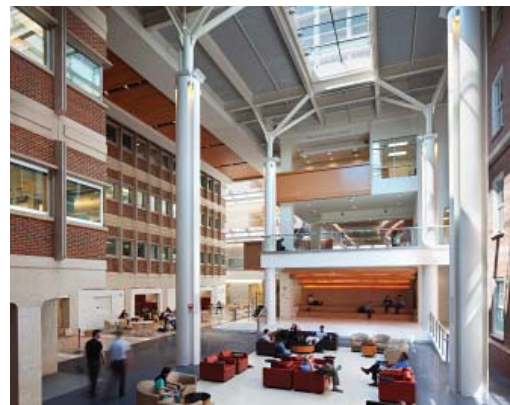
Flad's work for the Koury Oral Health Sciences Building began as a feasibility study with a goal of understanding issues related to site capacity and appropriate response to campus context in combination with a comprehensive programmatic evaluation for the academic programs and integration/connection to a series of existing buildings ranging from the 1950s to 1980s. The study results informed the recommended concepts for location of the 225,000-square-foot addition and its point of connection with the existing facilities to achieve a coherent, unified complex. Composed of two wings, the building houses clinical, research, and educational spaces including labs with movable casework and centralized, shared support rooms; a vivarium; and offices and conference rooms. A 105-seat simulation laboratory gives students the opportunity to learn and develop their clinical skills before providing care to patients.

#### RELEVANCE & INNOVATION

- Central atrium provides a professional home and community space for students and provides a gathering space to host school-wide events.
- Integrates pedestrian pathways and meaningful exterior space into the complex.
- Auditorium and tiered lecture accommodate the school and supports continuing education events.
- Distance learning and seminar rooms located throughout the building support problem-based curriculum and off-site connectivity.
- Simulation labs are showcased along main pedestrian pathway to broadcast signature programs.
- Developed as a phased project with early site utility package and several incremental up-fit projects for shelled space, as money became available.
- Vivarium and procedure rooms for small mammals.
- Flexible research labs accommodate a range of wet and dry research programs.
- LEED Gold with 26% energy performance and 42% water conservation.

Size: 225,000 SF | Cost: \$87M

**Awards** LEED-NC Gold, The Brick Industry Southeast Region 2013 Brick Design Award



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT			
	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
a.	Flad Architects	Raleigh, North Carolina and Madison, Wisconsin	Planning, programming, structural engineering, and full architectural services
b.	Affiliated Engineers, Inc.	Chapel Hill, North Carolina	MEP engineering
c.	Stewart	Raleigh, North Carolina	Civil engineering
d.	Froehling & Robertson, Inc.	Raleigh, North Carolina	Hazardous materials consultant
e.	Carolina Specialty Engineering (formerly Jensen Hughes)	Cary, North Carolina	Code consultant
f.	Mulford Cost Management	Wilmington, North Carolina	Cost estimating

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATES PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		<b>20. EXAMPLE PROJECT KEY NUMBER</b>  <div style="font-size: 2em; text-align: center;">2</div>				
<b>21. TITLE AND LOCATION (City and State)</b>  <b>University of Saskatchewan, Academic Health Sciences Centre, Complex-Wide Improvements; Saskatoon, Saskatchewan, Canada</b>		<b>22. YEAR COMPLETED</b> <table border="1"> <tr> <td>PROFESSIONAL SERVICES</td> <td>CONSTRUCTION <i>(If applicable)</i></td> </tr> <tr> <td><b>D Wing: 2012 A Wing: 2016 est.</b></td> <td><b>D Wing: 2012 A Wing: 2016 est.</b></td> </tr> </table>	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>	<b>D Wing: 2012 A Wing: 2016 est.</b>	<b>D Wing: 2012 A Wing: 2016 est.</b>
PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>					
<b>D Wing: 2012 A Wing: 2016 est.</b>	<b>D Wing: 2012 A Wing: 2016 est.</b>					
<b>23. PROJECT OWNER'S INFORMATION</b>						
<b>a. PROJECT OWNER</b>  <b>University of Saskatchewan</b>	<b>b. POINT OF CONTACT NAME</b>  <b>Brad Steeves</b>	<b>b. POINT OF CONTACT TELEPHONE NUMBER</b>  <b>306.966.8119</b>				
<b>24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)</b>						

Complex-wide improvements began with a feasibility study and assessment of existing conditions to create a unified health science complex that would accommodate research, educational, and clinic activities. The result is a series of strategic renovations and additions to the existing buildings. The outcome is a new identity and entrance for the complex. The project includes renovation of the historic A Wing, the original health sciences building on campus. The 99,800 square feet of renovations refurbish and preserve the exterior of the building and showcase historic tile work in the main lobby and interior corridors. Renovated program areas for laboratories and teaching facilities include four programs – anatomy, physical therapy, pharmacy, and nutrition. The program also includes auditoria, conference rooms, cadaver storage, kitchens, offices, and other support spaces, as well as a centralized location for the Centre's administration and the Dean's suite. The 180,000-square-foot biomedical research addition (D Wing) houses translational medicine, biomedical research laboratories, and a vivarium designed to accommodate multiple species. Psychology testing rooms are located adjacent to the vivarium. Interdisciplinary research labs include biology, psychology, neuroscience, and chemistry. In addition to having a building organization supportive of "team science", the highly visible facility provides a destination within the entire complex and within the campus for study and interaction.

#### RELEVANCE & INNOVATION

- Creates a new identity and front door for the College of Medicine and health sciences.
- College of Medicine program components were part of a phased development program including renovation of a 1950s-era and 1970s-era buildings to accommodate anatomy, and basic sciences teaching labs.
- Creates a social hub at the intersection between new and existing construction that maximizes daylight and views and provides collaborative spaces at key locations.
- Research and support spaces are designed to support and enable "team science" success, based on a new governance model for sponsored research.
- Complex and tight site that required moving an existing campus roadway and incorporated a utility tunnel infrastructure project in order to maximize buildable area and provide street frontage for the project.

Size: 279,800 | Cost: \$170M

**Awards** LEED Canada Silver (D Wing); American Heritage Society of Saskatchewan, 2015 Lieutenant Governor of Saskatchewan Heritage Architecture Excellence Award; Saskatchewan Masonry Institute, 2013 Presidential Masonry Design Award



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT			
	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	Flad Architects	Raleigh, North Carolina; Madison, Wisconsin	Planning, programming, and design

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATES PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER <div style="text-align: center; font-size: 24pt;">3</div>
21. TITLE AND LOCATION (City and State)		22. YEAR COMPLETED
<b>Medical College of Wisconsin, Master Plan and Professional Office Building (POB); Milwaukee, Wisconsin</b>		PROFESSIONAL SERVICES
		CONSTRUCTION <i>(If applicable)</i>
		2017 est.                      2017 est.
<b>23. PROJECT OWNER'S INFORMATION</b>		
a. PROJECT OWNER	b. POINT OF CONTACT NAME	b. POINT OF CONTACT TELEPHONE NUMBER
<b>Medical College of Wisconsin</b>	<b>Mike Stanislaus</b>	<b>414.955.8787</b>
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)		

The Medical College of Wisconsin (MCW), in partnership with Froedtert Hospital, is striving to enhance patient access and care delivery on their Milwaukee Regional Medical Center (MRMC) campus with the construction of a new, eight-story professional office building (POB) and other related backfill projects for two existing campus buildings to support a new school of pharmacy and education in the school of medicine.

The new 310,000-square-foot POB will create a collaborative work environment that joins the Medical College Physician practice, currently fractured across the MRMC campus, and strengthen the MCW's competitive advantage for retention and recruitment of world-class faculty and physicians. By consolidating over 1,200 faculty and staff to the new office complex, the vacated facilities can then be repurposed to provide new and improved patient care spaces.

Additional renovations and relocations will be required within the existing Medical Education Building and Health Research Center related to the backfill of vacated space and to support additional program growth accommodating a new School of Pharmacy program set to matriculate its first class of doctor of pharmacy students in 2017 – over 50,000 square feet of renovations will be done to the college's existing Medical Education Building and Health Research Center.

#### RELEVANCE & INNOVATION

- Educational spaces planned for the new School of Pharmacy space include telehealth / patient consult teaching areas, a sterile compounding suite, non-sterile wet labs, active learning classrooms, and informal student learning clusters.
- The design of the new POB will create efficiencies through proximity and adjacencies and provide flexible workspaces, shared resources and collaboration among departments and programs, and incorporate technology connecting staff and faculty.
- The POB will be physically connected to the Medical Education Building to the north on levels one, two, and three and connected to the Dynacare Lab Building to the south by an enclosed elevated skywalk over Connell Avenue.

Size: 310,000 SF (POB) 50,000 SF (renovations) | Cost: \$78M (POB) \$20M (renovations)



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT			
	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	Flad Architects	Madison, Wisconsin	Master planning and full architectural services

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATES PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>	<b>20. EXAMPLE PROJECT KEY NUMBER</b>  <div>5</div>
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21. TITLE AND LOCATION (City and State)	22. YEAR COMPLETED	
Duke University, School of Medicine, Trent Semans Center for Health Education; Durham, North Carolina	PROFESSIONAL SERVICES	CONSTRUCTION (If applicable)
	2010	2013

### 23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	b. POINT OF CONTACT TELEPHONE NUMBER
Duke University	Dr. Colleen O'Connor Grochowski	919.684.3130

### 24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

Recognizing the need for a centrally located education building to serve as the hub of its medical school, Duke University School of Medicine's new 115,000-SF Learning Center is at the heart of the Duke Health campus. The Center creates a home and focal point for the School's teaching, administrative and social activities, providing instructional space and simulation facilities that address innovative care delivery methods and training. Program elements include a 400-seat meeting room/conference center, a team-based lecture hall, instructional labs, group rooms and a floor devoted to student life that includes the admissions suite and advisory dean "living rooms." The Human Simulation and Patient Safety is designed to be expanded vertically to the floor above. The center supports interprofessional education, professional training and research as well as collaborations with industry. Taking this opportunity to transform its curriculum, Duke has adopted a team-based learning (TBL) approach requiring a specialized instructional methodology. Collaboration space is provided within the room enabling students to quickly move from lecture to small group mode yet benefit from the dynamics of multiple groups working together. As part of our work in designing the new Learning Center, we provided a master plan and the partial renovation of the adjoining Seeley Mudd Medical Library which involved redefining the space utilized by the Medical Library to consolidate and reallocate space to better serve medical school programs.



### RELEVANCE & INNOVATION

- New home and image for the School of Medicine anchoring the new academic Medical Center Campus.
- Supports inter-professional education scalable learning environments accommodating evolving inter-professional programs.
- A vertical network of Informal learning and social spaces including distinct learning communities support planned and unplanned events and activities enhancing community and sparking innovation.
- State-of-the-art simulation/skills center supports both the instruction and training of medical students and professionals and research with industry partners.
- Large format flexible instructional facilities, including a 400-seat meeting room and team-based lecture hall, and instructional labs.
- Designed with flexible studio loft space to support simulation and inter-professional programs.
- Medical education building is connected to existing medical library and academic medical center clinical facilities through a series of bridges and tunnels and shares maintenance infrastructure.
- New café and central shared student lounge/living room.



Size: 115,000 SF | Cost: \$40.8M | Role: Pre-Design, Design & Construction Documents Services, Programming/Planning, Interior Design, Cost Estimating, Sustainable Design

### 25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	The S/L/A/M Collaborative	Glastonbury, CT	Pre-Design, Design & Construction Documents Services, Programming/Planning, Interior Design, Cost Estimating, Sustainable Design
b.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATES PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		<b>20. EXAMPLE PROJECT KEY NUMBER</b>  <div style="font-size: 24pt; text-align: center;">6</div>				
<b>21. TITLE AND LOCATION (City and State)</b>  <b>Emory University, School of Medicine, Medical Education Building; Atlanta, Georgia</b>		<b>22. YEAR COMPLETED</b> <table border="1"> <tr> <td>PROFESSIONAL SERVICES</td> <td>CONSTRUCTION <i>(If applicable)</i></td> </tr> <tr> <td><b>2004</b></td> <td><b>2007</b></td> </tr> </table>	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>	<b>2004</b>	<b>2007</b>
PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>					
<b>2004</b>	<b>2007</b>					
<b>23. PROJECT OWNER'S INFORMATION</b>						
<b>a. PROJECT OWNER</b>  <b>Emory University</b>	<b>b. POINT OF CONTACT NAME</b>  <b>Dr. William Eley</b>	<b>b. POINT OF CONTACT TELEPHONE NUMBER</b>  <b>404.778.1900</b>				
<b>24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)</b>						



Emory University's School of Medicine has an aggressive plan to become a "Top 10" medical school and worked with SLAM to create a "next generation" medical education building to support that goal. The project involved programming/planning studies and design of a 167,000-SF complex to accommodate an increased class size with a revamped curriculum that integrates basic and clinical sciences using a problem-based learning pedagogy. It also was intended to provide a facility that was focused on interprofessional partnering. A new wing connects two historic buildings and includes three 160-seat lecture halls (one to accommodate the School of Nursing) as well as seminar rooms and instructional spaces for interactive small-group sessions; clinical skills and standardized patient areas; teaching labs; simulation (ER & OR) labs; and the medical school administration offices, including the Dean's suite. Two 40-station student computer labs are located adjacent to four Objective Structured Clinical Examination pods, uniquely arranged with four mock exam rooms around an open seminar area. The flexible instructional spaces that are the by-product of this comprehensive programming and planning process are designed to support interprofessional education and anticipate changing pedagogies driven by continuously evolving medical knowledge and technology. The completed building meets Emory's educational needs while creating new iconic image for the School of Medicine and provides an intellectual and social "home" for their students, faculty, and alumni.

#### RELEVANCE & INNOVATION

- Renovation of two historic building wings with new addition that created a new image for the School of Medicine.
- Creates a "home" for medical students and new face and front door for medical school.
- Teaching spaces designed to support growth of class size and inter-professional instruction.
- Program spaces include classrooms, simulation labs, skills suites, learning communities, administration offices.
- Student and community amenity space.
- Inter-professional teaching space.
- Designed to support engagement with the academic and professional community with educational and conferencing spaces that draw clinicians from across Emory's academic medical center.
- Facility has enhanced Emory's ability to recruit students, faculty, and staff while growing enrollment.

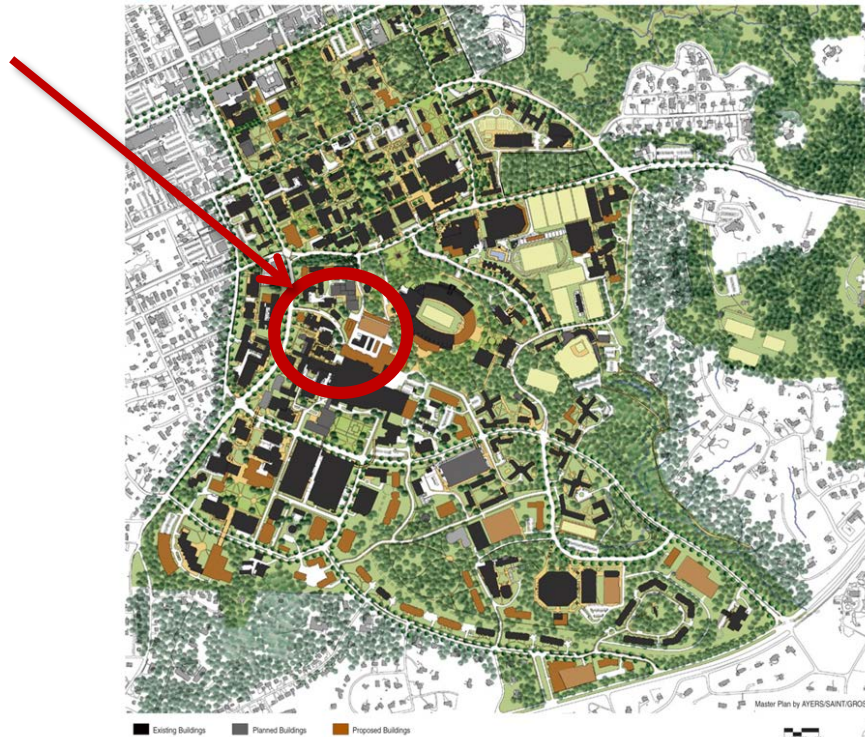
Size: 167,000 SF | Cost: \$44M | Role: Pre-Design, Design & Construction Documents Services, Programming/Planning, Landscape Architecture, Interior Design, Construction Administration

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT			
	(1) FIRM NAME	(2) FIRM LOCATION ( <i>City and State</i> )	(3) ROLE
a.	The S/L/A/M Collaborative	Glastonbury, CT	Pre-Design, Design & Construction Documents Services, Programming/Planning, Landscape Architecture, Interior Design, Construction Administration



# Medical Education Building

PROJECT LOCATION



2006 CAMPUS MASTER PLAN



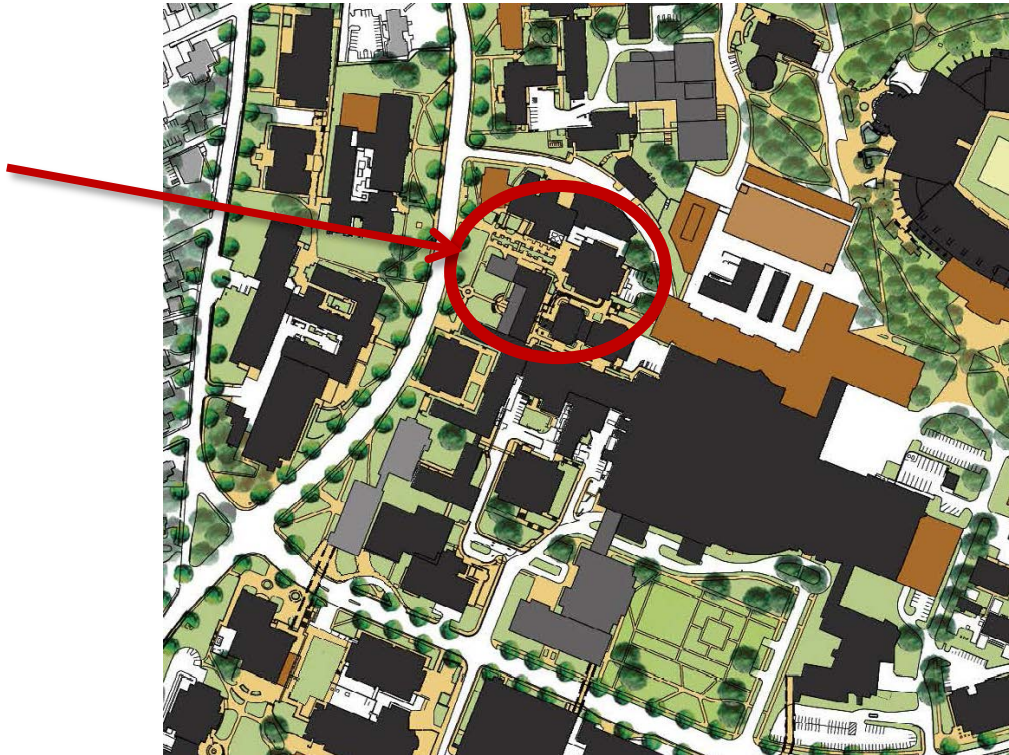
UNC  
DIVISION OF FINANCE  
AND ADMINISTRATION

Designer Approval



# Medical Education Building

PROJECT SITE



N

SITE PLAN



UNC  
DIVISION OF FINANCE  
AND ADMINISTRATION

Designer Approval

## **ATTACHMENT G**

### **DESIGNER SELECTION – UNC Mountain Area Health Education Center (MAHEC)**

This project will construct approximately 36,000 square feet at the MAHEC campus in Asheville, NC. The building will house a surgical simulation lab, clinical space for the MAHEC Psychiatry Residency and classroom and office space for the School of Medicine, Center for Health Professions Education and School of Public Health Programs.

The project budget is \$8,000,000 and will be funded by the State of North Carolina through the UNC School of Medicine.

This project was advertised on August 1, 2016. Five (5) proposals were received. Three (3) firms were interviewed on August 26, 2016. Members of the Board of Trustees did not participate in the interviews.

The committee recommended the selection of the three firms in the following priority order:

- |    |                           |               |
|----|---------------------------|---------------|
| 1. | LS3P                      | Charlotte, NC |
| 2. | Clark Nexsen              | Asheville, NC |
| 3. | Masters Gentry Architects | Asheville, NC |

The firms were selected for their past performance on similar projects, strength of their consultant team and experience with campus projects.

### **RECOMMENDED ACTION**

A motion to approve the three firms in the following priority order:

- |    |                           |               |
|----|---------------------------|---------------|
| 1. | LS3P                      | Charlotte, NC |
| 2. | Clark Nexsen              | Asheville, NC |
| 3. | Masters Gentry Architects | Asheville, NC |



August 16, 2016

Mr. Tom Loter  
University of North Carolina at Chapel Hill  
Facilities Planning & Design Department  
Giles F. Horney Building, Suite 202  
103 Airport Drive  
CB #1090  
Chapel Hill, NC 27599-1090

ARCHITECTURE

INTERIOR  
ARCHITECTURE

PLANNING

Re: UNC – Mountain Area Health Education Center Education Building  
The University of North Carolina at Chapel Hill, School of Medicine

Dear Mr. Loter and Selection Committee,

LS3P is pleased to present to you our qualifications for the design of the proposed UNC School of Medicine Education Building to be located on the MAHEC campus in Asheville, NC. We have been the design partner and trusted advisor to MAHEC for the past ten years and believe that our continued relationship and involvement with this project will support your project's overall success.

Our firm believes in strategic design that is forward thinking and reflective of the overall vision for the project. We helped MAHEC establish a vision for the campus and completed the design of Buildings One, Two and Three. The NCCHA (Building Two) was completed under the state construction requirements through Western Carolina University.

CHARLESTON

COLUMBIA

GREENVILLE

MYRTLE BEACH

CHARLOTTE

RALEIGH

WILMINGTON

SAVANNAH

We take a collaborative approach to design and have assembled the team of design consultants who have both worked on previous MAHEC buildings and have worked extensively with LS3P on similar type design projects. Our team is knowledgeable, responsive, and will work within the project goals to advise and design the appropriate systems suitable for this type of building. We will learn from our past project experiences and apply that knowledge to this design.

We have been working for the past several months on the design of the Sim Lab that was previously proposed for the ground floor of the OB/GYN building. In the design of this space we utilized the design experts in our firm who have completed similar projects, this team developed a plan that was coordinated within the existing building and contained the necessary program as developed with the user groups of the proposed lab. The elements of the Sim Lab design concept and our knowledge gained during the process will be applied to this current project. Additionally, we have been working closely with MAHEC on the conceptual design for this current project. We understand the programmatic requirements for this project and have been working closely with the faculty of each of the proposed spaces to develop concept floor plans and elevations of the proposed building. Our working knowledge of the project will allow us to quickly proceed into the schematic design and design development phases of the project.

Our firm values our relationships with MAHEC and UNC. We strive to provide effective communication, we understand budget and time constraints, and we work to design projects that are within the set budget and time parameters. We understand the value of consistency, and our existing team of architects and engineers will remain committed to the project through construction and occupancy. Select members of our team have extensive knowledge working with the state construction office and on university education projects, including the new College of Health Sciences that recently broke ground at Appalachian State University.

We enjoy our practice and work to foster long-term relationships with our clients. This project is a natural extension of our relationship with MAHEC and offers the opportunity to draw upon our experience with the campus and with similar projects completely directly by our proposed team and collectively by our firm.

We would welcome the opportunity to be able to further present to you our team, our project experience and our design process. Please do not hesitate to contact me directly if you have any questions or need additional information. Thank you, again, for your consideration.

Very truly yours,

LS3P

John Kincheloe, AIA, LEED AP  
Principal in Charge

# Architect-Engineer Qualifications

## Part I – Contract-Specific Qualifications

### A. Contract Information

1. TITLE AND LOCATION (City and State) UNC-Mountain Area Health Education Center (MAHEC) Education Building, Asheville, NC	
2. PUBLIC NOTICE DATE August 1, 2016	3. SOLICITATION OR PROJECT NUMBER

### B. Architect-Engineer Point of Contact

4. NAME AND TITLE John Kincheloe, AIA, LEED AP      Principal		
5. NAME OF FIRM LS3P ASSOCIATES LTD.		DUNS #: 12-174-4325
6. TELEPHONE NUMBER 704.333.6686	7. FAX NUMBER 704.333.2926	8. E-MAIL ADDRESS johnkincheloe@ls3p.com

### C. Proposed Team

(Complete this section for the prime contractor and all key subcontractors.)

	(Check)			9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
	Prime	JV Partner	Subcontractor			
a.	<input checked="" type="radio"/>			LS3P <input checked="" type="checkbox"/> Check if branch office	227 West Trade Street Suite 700 Charlotte, NC 28202	Architecture, Interiors, Construction Contract Administration
b.			<input checked="" type="radio"/>	McCracken & Lopez <input type="checkbox"/> Check if branch office	2151 Hawkins Street Suite 500 Charlotte, NC 28203	MEP + Fire Protection
c.			<input checked="" type="radio"/>	Walker Engineering <input type="checkbox"/> Check if branch office	6060 Piedmont Row Drive Suite 524 Charlotte, NC 28287	Structural Engineering
d.			<input checked="" type="radio"/>	WGLA <input type="checkbox"/> Check if branch office	214 N. King Street Hendersonville, NC 28792	Civil Engineering
e.			<input checked="" type="radio"/>	Sitework Studios <input type="checkbox"/> Check if branch office	352 Depot Street Suite 120 Asheville, NC 28801	Landscape Architect, Land Planning
f.				<input type="checkbox"/> Check if branch office		

### D. Organizational Chart of Proposed Team

☒ Attached

**F. Example Projects Best Illustrating Proposed Team's Qualifications for This Contract**  
(Present as many projects as requested by the agency, or 10 projects. Complete one Section F for each project.)

20. EXAMPLE PROJECT  
KEY NO. **1**

21. TITLE AND LOCATION (City and State) <b>North Carolina Center for Health and Aging at Western Carolina University</b> Asheville, North Carolina		22. YEAR COMPLETED	
		professional services 2011	construction (if applicable) 2011
23. PROJECT OWNER's INFORMATION			
a. Project owner Western Carolina University	b. Point of contact name Ron Fagan Director, Facilities Management	c. Point of contact telephone number 828.257.4413	

24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

This new educational, administrative, and clinical facility for the Western Carolina University Mountain Area Health Education Center (MAHEC) provides education, information, technology, research, training, and services to improve health outcomes in Western North Carolina. The three campus buildings total 130,000 square feet and are oriented to take advantage of the site's topography.

The North Carolina Center for Health and Aging (NCCHA) building is approximately 50,000 square feet and houses large classroom spaces, a library, and a student café area. The second floor contains administrative offices and a 40,000-square-foot OB/GYN clinic. A monumental stair in the double-height lobby connects the two levels. Exam rooms and doctor's offices are located at the perimeter of each floor, with procedure rooms and support areas in the central core of the building.

The exterior architecture is defined by wood laminated entry pavilions that recall mountain area timber design. Sloping stone and masonry piers provide accents and relief to the building elevations. The use of stone, wood and wrought iron evokes the rustic vernacular that is carried through to the interior's main spaces. *Size: 130,000 SF; Cost: \$19,3000,000*



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

(1) FIRM NAME LS3P ASSOCIATES LTD.	(2) FIRM LOCATION (City and State) Charlotte, North Carolina	(3) ROLE Architect, Interiors, Constr. Admin
(1) FIRM NAME McCracken & Lopez	(2) FIRM LOCATION (City and State) Charlotte, North Carolina	(3) ROLE MEP
(1) FIRM NAME WGLA	(2) FIRM LOCATION (City and State) Hendersonville, North Carolina	(3) ROLE Civil Engineering
(1) FIRM NAME Sitework Studios	(2) FIRM LOCATION (City and State) Asheville, North Carolina	(3) ROLE Landscape Architecture
(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE

**F. Example Projects Best Illustrating Proposed Team's Qualifications for This Contract**  
(Present as many projects as requested by the agency, or 10 projects. Complete one Section F for each project.)

20. EXAMPLE PROJECT  
KEY NO. **2**

21. TITLE AND LOCATION (City and State) <b>MAHEC Simulation Lab</b> Asheville, North Carolina	22. YEAR COMPLETED	
	professional services <b>Ongoing</b>	construction (if applicable)

23. PROJECT OWNER's INFORMATION

a. Project owner <b>Western Carolina University</b>	b. Point of contact name <b>Ron Fagan</b> Director, Facilities Management	c. Point of contact telephone number <b>828.257.4413</b>
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

The MAHEC Simulation lab was designed to be built on the ground floor of the existing MAHEC OB/GYN building. LS3P worked with MAHEC and its education and medical teams to develop a program and a space plan that would accommodate simulation rooms, OSCE rooms, training rooms, storage and faculty office space. The simulation rooms were designed around a central control room with view windows from the control room and the corridors into the simulation rooms. Interior finishes and spaces were designed to create a high fidelity environment that replicates an actual hospital experience for the medical students and faculty that would occupy the space. Task training rooms were designed as multi-use spaces that could be utilized for hands on training and didactics. Conference rooms were designed to accommodate both small and large meetings and to allow medical debriefings of the simulated procedures that were performed.

The sim lab was integrated into an existing structural bay system and connected to an existing lobby space to create a connection to the upper floors of the building. A new dedicated exterior entry was created to provide access to the sim lab and to allow a mobile simulation truck to be parked adjacent to the entry. Ultimately, the project was not completed as the lab was relocated to the another space on the MAHEC campus. *Size: 15,000 SF; Cost: \$2,000,000 (est.)*



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

(1) FIRM NAME <b>LS3P ASSOCIATES LTD.</b>	(2) FIRM LOCATION (City and State) <b>Charlotte, North Carolina</b>	(3) ROLE <b>Architect, Interiors, Constr. Admin</b>
(1) FIRM NAME <b>McCracken &amp; Lopez</b>	(2) FIRM LOCATION (City and State) <b>Charlotte, North Carolina</b>	(3) ROLE <b>MEP</b>
(1) FIRM NAME <b>Walker Engineering</b>	(2) FIRM LOCATION (City and State) <b>Hendersonville, North Carolina</b>	(3) ROLE <b>Structural Engineering</b>
(1) FIRM NAME <b>Sitework Studios</b>	(2) FIRM LOCATION (City and State) <b>Asheville, North Carolina</b>	(3) ROLE <b>Civil &amp; Landscape Architecture</b>
(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE

**F. Example Projects Best Illustrating Proposed Team's Qualifications for This Contract**  
(Present as many projects as requested by the agency, or 10 projects. Complete one Section F for each project.)

20. EXAMPLE PROJECT  
KEY NO. **4**

21. TITLE AND LOCATION (City and State) <b>Appalachian State University College of Health Sciences</b> Boone, North Carolina		22. YEAR COMPLETED	
		professional services 2016	construction (if applicable) 2018 (Est.)
23. PROJECT OWNER's INFORMATION			
a. Project owner Appalachian State University	b. Point of contact name Carole Acquesta Director Planning, Design, and Construction	c. Point of contact telephone number 828.262.4961	
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)			

LS3P was selected to provide advance planning, programming, and design for the \$80 million College of Health Sciences at Appalachian State University. The complex is located on a nine-acre parcel of land adjacent to the local hospital and consists of a 203,000-gross-square-foot, five-story academic building, a future 63,000-gross-square-foot, three-story Medical Office Building, and associated site-work including a landscaped student plaza, 320 surface parking spaces, and off-site road improvements. The academic building and site development will be delivered using the CM@Risk method while the medical office building will be privately developed and financed.

The academic building will unite academic programs located in the Departments of Nursing, Communication Sciences and Disorders, Health and Exercise Science, Recreation and Physical Education, Social Work, Nutrition and Health Care Management that are currently dispersed in multiple locations around campus making collaboration and instruction difficult. Being co-located in the same building will allow different disciplines to obtain experiential training together in shared simulation laboratories, assessment and training rooms. *Size: 203,000 SF; Cost: \$75,000,000*



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

(1) FIRM NAME LS3P ASSOCIATES LTD.	(2) FIRM LOCATION (City and State) Charlotte, North Carolina	(3) ROLE Architect, Interiors, Constr. Admin
(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE

**F. Example Projects Best Illustrating Proposed Team's Qualifications for This Contract**  
(Present as many projects as requested by the agency, or 10 projects. Complete one Section F for each project.)

20. EXAMPLE PROJECT  
KEY NO. **7**

21. TITLE AND LOCATION (City and State) <b>Charlotte Eye Ear Nose &amp; Throat Medical Office Building</b> Huntersville, North Carolina		22. YEAR COMPLETED professional services 2014		construction (if applicable) 2015
23. PROJECT OWNER's INFORMATION				
a. Project owner <b>Charlotte Eye Ear Nose &amp; Throat Associates, PA</b>	b. Point of contact name Bruce Marshman Director of Property Development and Construction	c. Point of contact telephone number 704.295.3429		
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)				

CEENTA Huntersville is a two-story 38,000 SF medical office building developed for Charlotte Eye Ear Nose and Throat Associates (CEENTA) by Merrifield Patrick Vermillion. Both MPV and CEENTA are LS3P legacy clients. CEENTA Huntersville represents the 12th project completed for CEENTA over the past 10 years. The building is part of a planned larger development that MPV is developing in Huntersville.

The exterior of the building is highlighted by recessed brick volumes that allow openings to be placed around the building providing natural light into the clinical spaces of the interior. Curved metal roofs are used to highlight the building entry and the patient drop off area. Patient waiting areas surround a circular check-in desk that is covered by a round ceiling with reveals radiating out to form the impression of an eye. *Size: 38,000 SF; Cost: \$4,500,000*



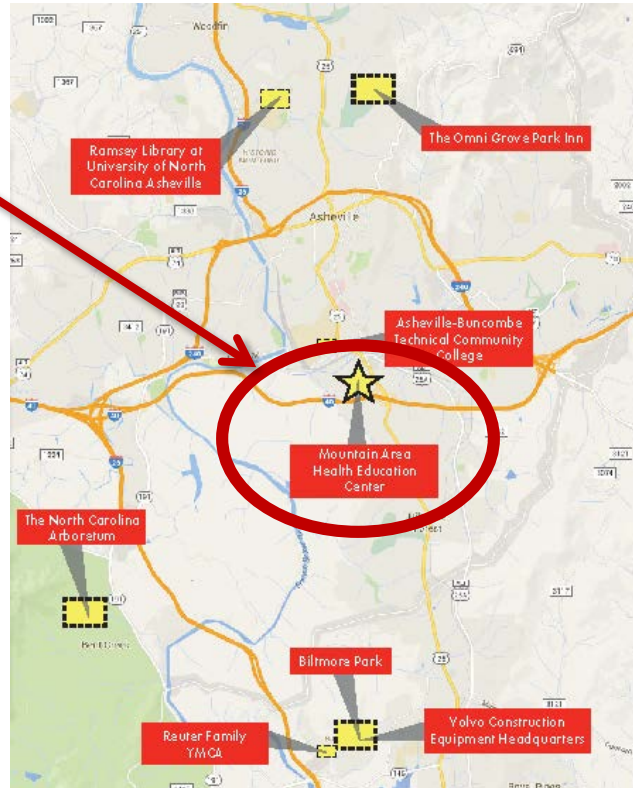
25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

(1) FIRM NAME LS3P ASSOCIATES LTD.	(2) FIRM LOCATION (City and State) Charlotte, North Carolina	(3) ROLE Architect, Interiors, Constr. Admin
(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE



# UNC Mountain Area Health Education Center (MAHEC)

PROJECT LOCATION



LOCATION MAP



N



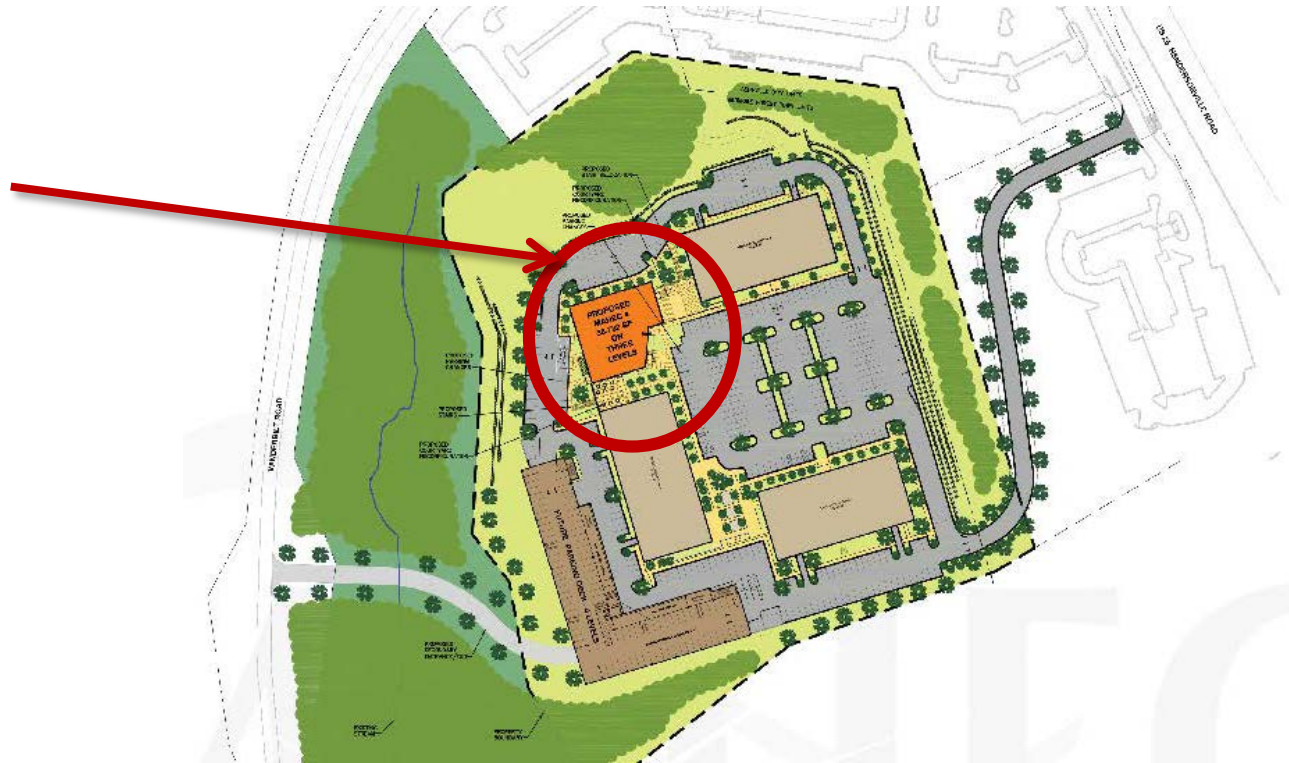
UNC  
DIVISION OF FINANCE  
AND ADMINISTRATION

Designer Approval



# UNC Mountain Area Health Education Center (MAHEC)

PROJECT SITE



SITE PLAN



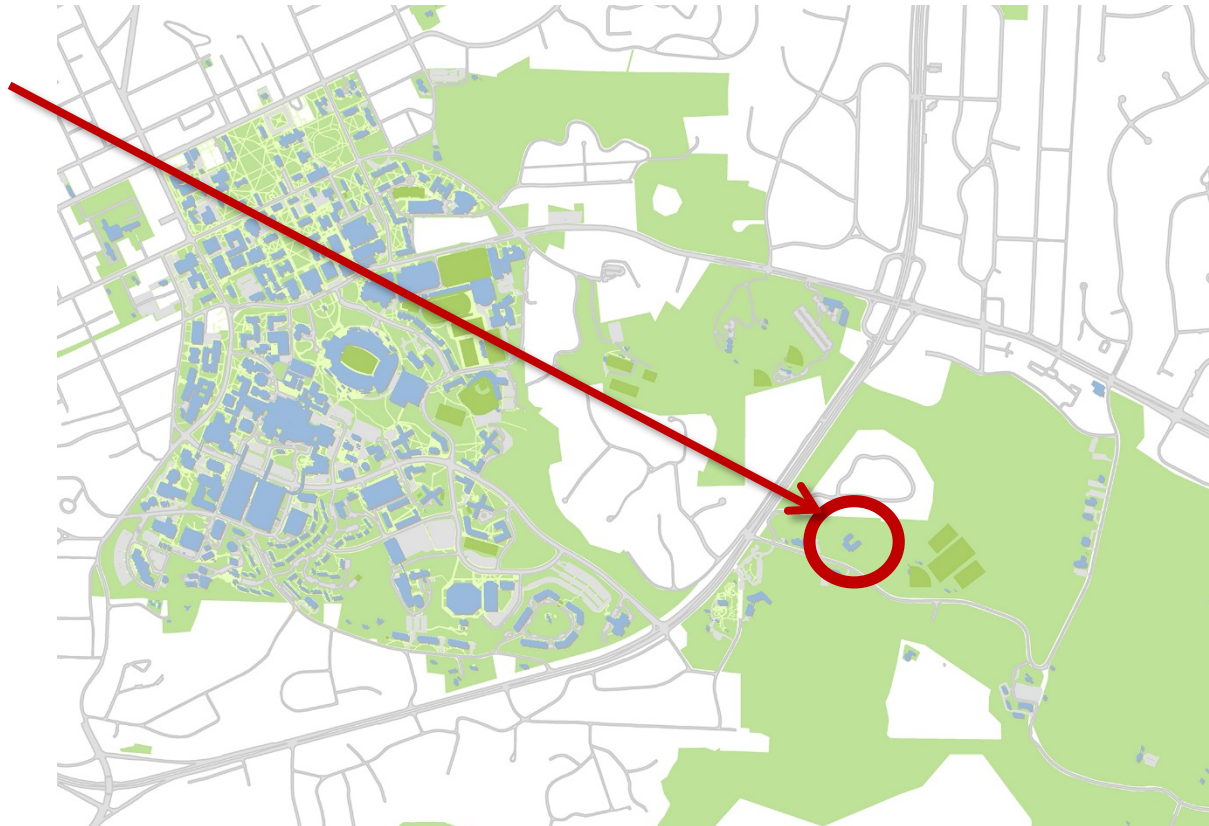
UNC  
DIVISION OF FINANCE  
AND ADMINISTRATION

Designer Approval



# SECU Family House Expansion

PROJECT LOCATION



CAMPUS MAP



N



UNC  
DIVISION OF FINANCE  
AND ADMINISTRATION

Design Approval

## **ATTACHMENT H**

### **DESIGN APPROVAL – SECU FAMILY HOUSE EXPANSION**

This project will expand the current SECU Family House by adding 36 guest rooms which will provide the facility with 75 total guest rooms. In addition, the expanded site will provide walking and exercise areas, a meditation garden and a common outdoor area easily accessible to the Family House for the guests.

The ground lease for approximately 3.6 acres of additional area was approved by the Board of Trustees at their May 2016 meeting.

The construction budget is \$8.0M and will be funded by the SECU Family House.

The Chancellor's Buildings and Grounds Committee approved the site on September 1, 2016.

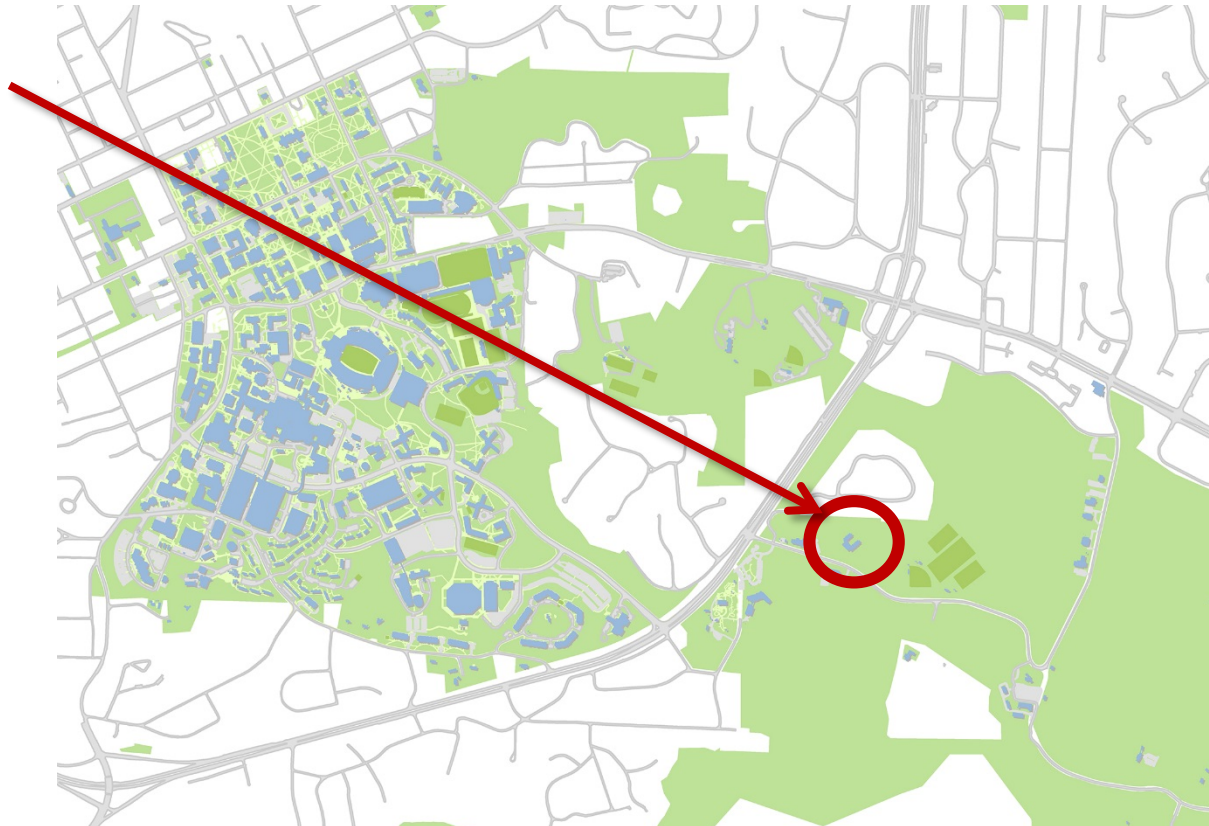
### **RECOMMENDED ACTION**

A motion to approve the design.



# SECU Family House Expansion

PROJECT LOCATION



CAMPUS MAP



N



UNC  
DIVISION OF FINANCE  
AND ADMINISTRATION

Design Approval



# SECU Family House Expansion

PROJECT SITE



2006 CAMPUS MASTER PLAN



# SECU Family House Expansion



Main entry approach



Main Entry

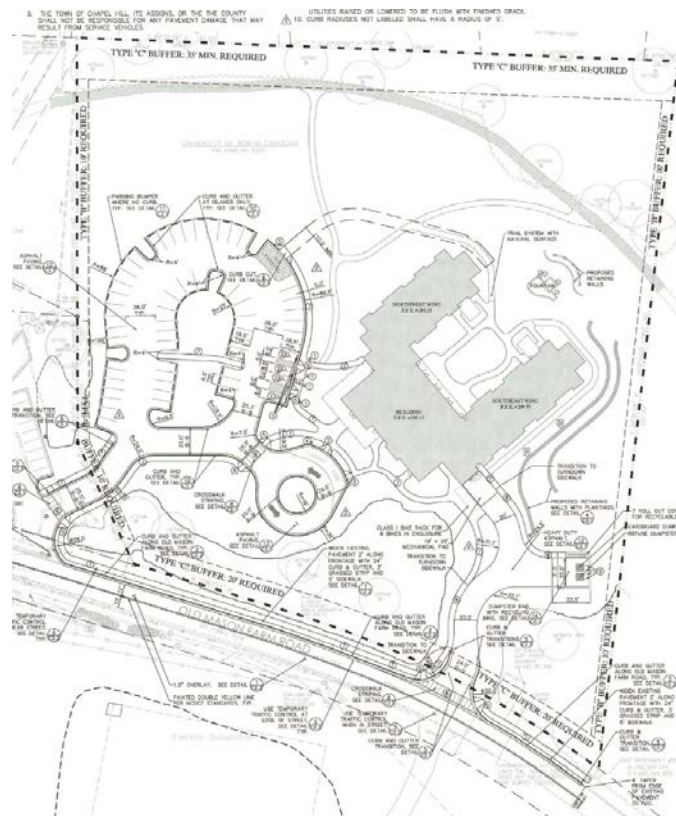


Courtyard

EXISTING FAMILY HOUSE



# SECU Family House Expansion



EXISTING SITE PLAN



UNC  
DIVISION OF FINANCE  
AND ADMINISTRATION

Design Approval



# SECU Family House Expansion



PROPOSED SITE PLAN



UNC  
DIVISION OF FINANCE  
AND ADMINISTRATION

Design Approval



# SECU Family House Expansion



PROPOSED ADDITION — AERIAL PERSPECTIVE





# SECU Family House Expansion



PROPOSED ELEVATIONS



**UNC**  
DIVISION OF FINANCE  
AND ADMINISTRATION

Design Approval



# SECU Family House Expansion

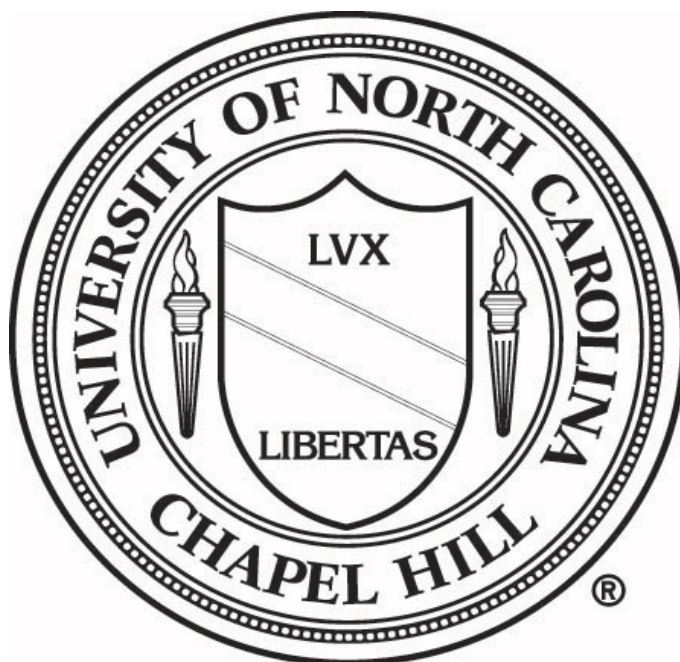


PROPOSED ELEVATIONS



UNC  
DIVISION OF FINANCE  
AND ADMINISTRATION

Design Approval



**Risk Assessment and Internal Audit Plan  
2016/17**

## Table of Contents

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Introduction..... 3

Risk Assessment Process..... 4

### Appendices:

A: Calculation of Available Work Hours

B: 2016/17 Audit Work Schedule

## Introduction

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Each year, the Internal Audit Department of the University of North Carolina at Chapel Hill develops an audit work plan based on a university-wide assessment of risk. This approach is in keeping with the Institute of Internal Auditors' *International Standards for the Professional Practice of Internal Auditing* (IIA Standards) and the Internal Audit Act (NCGS § 143-746) which requires internal audit functions in NC State agencies and institutions to comply with the IIA Standards. Also, basing audit work plans on risk helps ensure that audit resources are allocated effectively and efficiently and in a way that best helps manage and the Board of Trustees provide governance and fulfill the University's mission.

The primary objectives of the risk assessment process are to:

- Ensure compliance with *IIA Performance Standard 2010 – Planning* which states: “The chief audit executive must establish risk-based plan to determine the priorities of the internal audit activity, consistent with the organization’s goals” and with North Carolina’s Internal Audit Act;
- Gather information about the organizational structure of the University, its operations, and its finances and about trends and recent concerns in higher education;
- Identify expectations and risk concerns of University management and members of the Finance, Infrastructure, and Audit Committee of the Board of Trustees;
- Identify opportunities for sharing audit resources and avoiding duplication of work by coordinating audit efforts;
- Develop an audit work plan based on risks and opportunities identified during the assessment process; and
- Present the work plan and results of the risk assessment to the Chancellor of the University of North Carolina at Chapel Hill and the Finance, Infrastructure, and Audit Committee of its Board of Trustees for review and approval.

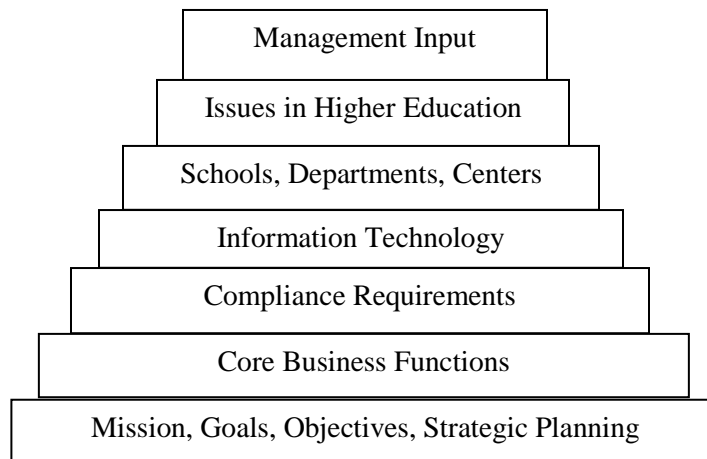
While the initial work plan is developed based on a formal risk assessment process, risks change throughout the year. Therefore, we monitor changes at the University and in higher education during the year and make revisions the work plan as needed.

## **Risk Assessment Process**

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The risk assessment and audit planning process involves developing an audit universe and considering how different components of risk affect individual auditable units and the University as a whole.

### **Audit Universe Development Model**



### **Risk Components**

1. Strategic risks – relate to mission and goals of the University
2. Financial risks – relate to stewardship and safeguarding of resources
3. Operational risks – relate to processes used to achieve mission and goals
4. Compliance risks – related to laws, rules, regulations, and other requirements
5. Reputational/service risk – relate to public image and the impact of service failure

## **Step 1: Update and Create Audit Universe**

The risk assessment process begins with a review of the organization structure of the University and the identifying by various missions, functions, and financial activities of individual departments and other units. What these units are here to do and how they seek to accomplish their mission, goals, etc. forms the base of the audit universe.

- While some component units have unique or free-standing activities, they all share the same core business function such as payroll, small order purchasing, travel, etc. Responsibility for these functions is shared by departments and central offices; this shared responsibility affects both the risks associated with the functions and how they are best audited. We choose to audit core business functions university-wide – an approach that includes an assessment of processes in central offices as well as in a sample of individual units. We believe this approach provides a “birth to death” review that can better identify gaps in or redundancies in internal controls.
- Although some elements of the audit universe are based on internal factors, external compliance requirements are major issues in the University’s risk and operating environment. The University has overall policies and procedures that govern how to comply with requirements. In many cases, one or more central units have primary responsibility for monitoring compliance. Since most compliance activities are overseen, centrally, we believe that they are best audited as a central function.
- Information technology (IT) supports and enables nearly all functions and activities of the University. IT has unique audit and business risks such as disaster recovery, data and physical security, patching, access controls, change controls, data retrieval and reporting, etc. IT at the University is a hybrid function with central systems and servers managed by Information Technology Services and departmental/school servers and systems managed by those units. The IT portion of our audit universe includes a combination of audits of central systems, governance, and policy. We will assess issues related to departmental/school systems through general controls review done as part of broader audits of these units.
- Some schools, departments, and centers have unique activities or IT systems. In addition, the highly decentralized nature of the University makes it necessary to include individual units in our audit universe. This practice provides a way to assess, on a more granular level, activities and potential risks across the University. The audits will also provide an opportunity to share information with individual units and to keep the University community aware of Internal Audit as a resource for advice and guidance.
- The final steps in developing an audit universe involve tapping into and leveraging the knowledge of colleagues at other universities and of key members of University management. These individuals are a valuable resource for identifying any need to adjust audit units or approaches to better address current and future risks.

## **Step 2: Assess Risk**

- Interview the Chairman of the Finance, Infrastructure, and Audit Committee of the Board of Trustees and key members of University management to identify their views of challenges and opportunities for the University and to get suggestion for items to be included in the audit work plan;
- Consider risk factors:
  - Significance of operations;
  - Impact of a service delay or failure;
  - Sensitivity of information managed;
  - Extent of regulation;
  - Changes in management or the operating environment;
  - Key Performance Indicators calculated each month for the UNC Business Compliance Program;
  - Amount of time since any prior audits (internal or external) and the status of findings from any prior audits;
  - Public or political sensitivity; and
  - Financial characteristics; and likelihood and impact of risks facing an area.
- Assign relative risk to auditable units: high, medium risk, or low risk.

## **Step 3: Develop Audit Work Plan**

Determine available audit hours based on size of audit staff, available work hours per staff member, and estimates of time for administrative activities such as training, meetings, and leave. Refer to Appendix A for the calculation of available audit hours.

Allocate blocks of time for unplanned audits, investigations, advisory work, and annual projects.

To select items for the rest of the 2016/17 audit work schedule we considered:

- Available audit hours;
- Projects from the 2015/16 audit work plan that needed to be carried forward;
- Specific requests by management or members of the Board of Trustees;

- Nature and timing of any recent or anticipated changes in an area (such as a system conversion, new financial management, extensive process revisions, etc.); and
- Recent events at the University and at other colleges and universities that have raised the visibility and sensitivity of certain activities.

After possible units for the 2016/17 audit work schedule were selected, hours were budgeted for each project based on nature of the area audited and the anticipated audit work in an area. If necessary, possible units were added or dropped in order to have a work plan that fit available hours.

Refer to Appendix B for the 2016/17 Audit Work Plan.

#### **Step 4: Finalize the Work Plan**

Submit the risk assessment to the Chancellor and Finance, Infrastructure, and Audit Committee for review and approval.

Submit the approved plan to General and Administration and the Council of Internal Auditing for their records.

**Appendix A**  
**2016/17 Risk Assessment and Audit Plan**  
**Calculation of Available Hours**

Total Hours Available -1-	14,560
Less: hours due to vacancies -2-	<u>(3,640)</u>
<b>Adjusted Available Hours</b>	<b>10,920</b>
Less: Training and Professional Development -3-	(420)
Less: Leave -4-	(2,342)
Less: Other Administrative Time -5-	<u>(1,240)</u>
<b>Available for projects</b>	<b>6,919</b>

-1- = seven staff members at 2080 hours each

-2- = three vacant positions - one vacant position to be filled by 9/30/16  
& one by 12/31/16; the other will remain vacant due to lack of funding

-3- = allow 80 training hours each per year for each staff members -  
pro-rated reduction for vacant positions

-4- = estimate based on actual holidays, leave balances, and leave  
taken in prior years - pro-rated reduction for vacant positions

-5- = meetings, professional reading, & other office activities  
not chargeable to a project

**Appendix B**  
**UNC Internal Audit**  
**Risk Assessment and Audit Plan**  
**FY 2016/17**

<b><u>Planned Audits</u></b>	<b><u>Hours Budgeted</u></b>
Historically Underutilized Business Program	350
Cleary Act Reporting	225
Export Controls	450
Governance - Trustee Orientation	200
Access Revocation	400
<b>Total for Routine Audits</b>	<b><u>1,625</u></b>
<b><u>Annual Projects</u></b>	
Follow-up for Prior Internal Audit Findings	700
Risk Assessment and Audit Plan	200
Follow-up for OSA Audit	150
UNC Business Compliance Program 2017	150
<b>Total for Annual Projects</b>	<b><u>1,200</u></b>
<b><u>Audit Related</u></b>	
CERTIF	200
Internal QAR	250
Office Systems	500
HIPAA Risk Assessment	80
Audit Committee	100
KPI Reporting	20
HIPAA Security Liaisons	80
Data Access and Reporting	250
UCPPD	100
<b>Total for Annual Projects</b>	<b><u>1,580</u></b>
<b><u>Requested Reviews, Consulting, and Other Unplanned Projects</u></b>	<b><u>2,800</u></b>
<b>Total Hours Scheduled</b>	<b><u>7,205</u></b>
Total Hours Available	6,919
Under/<Over>Scheduled	<u>(287)</u>

**UNC Internal Audit  
Use of Audit Resources  
Summary of Audit Hours Used - FY 2017 as of 08/21/16**

	<b><u>Budgeted</u></b>	<b><u>Pro-Rated Budget -5-</u></b>	<b><u>Hours Charged</u></b>	<b><u>Variance (Over)/Under</u></b>
Total Hours Available -1-	14,560	n/a	n/a	n/a
<u>Less:</u> Vacancies -2-	(3,640)	n/a	n/a	n/a
<u>Less:</u> Training & Professional Development	(420)	(43)	29	14
<u>Less:</u> Leave	(2,341)	(240)	220	20
<u>Less:</u> Other Administrative Time -3-	(1,240)	(129)	159	(30)
<b>Total for Training, Leave, &amp; Administrative</b>	4,001	412	407	
<b>Hours Available for Projects</b>	<b>6,919</b>			
Routine Audits	1,625	-5-	4	
Annual Projects	1,200	-5-	305	
Audit Related -4-	1,580	-5-	211	
Unplanned Projects and Advisory Work	2,800	-5-	414	
<b>Total Scheduled/Charged</b>	7,205	931	934	
<b>Under/&lt;Over&gt; Scheduled</b>	(286)			

-1- = seven staff members at 2080 hours/year

-2- = one vacancy projected to be filled by 09/30/16; another to be filled by end of calendar year; one position projected to be left vacant due to lack of funding

-3- = meetings, professional reading, and other office activities

-4- = consulting and advisory work, activities that improve audit operations.

-5- = Budgeted hours for four staff members for seven weeks. Pro-rated budget for audits and other projects is shown as a total because pro-rating by project type skews data. Fewer staff resources in first part of the fiscal year and planned start dates of individual projects mean that budgeted hours cannot not be evenly allocated to each week of the fiscal year.

**UNC Internal Audit**  
**2016/17 Status of Audit Schedule as of 08/21/16**

**Planned Audits**

**In Process**

Historically Underutilized Business Program  
Clery Act Reporting

**Scheduled**

Export Controls  
Governance - Trustee Orientation  
Access Revocation

**Annual Projects**

**Complete**

2016/17 Risk Assessment and Audit Plan

**In Process**

Follow-up for Prior Internal Audit Findings  
2016 State Audit  
Enterprise Resource Planning

**Scheduled**

2nd Follow-up - 2015 OSA Financial Statement Audit  
Follow-up for 2016 OSA Audit  
UNC Business Compliance Program 2017

**Audit Related**

**Complete**

SACS 2016

**In Process**

CERTIF  
Internal QAR  
HIPAA Risk Assessment

**Scheduled**

Internal QAR

**On Going**

Continuous Auditing  
Office Systems  
HIPAA Security Liaison  
University Committee on the Protection of Personal Data  
Privacy Liaison  
Audit Committee  
Audit Process Improvement  
HIPAA Risk Assessment  
UNCAA Conference Planning  
Board of Governors' Meetings  
Multiple Short-term Advisory Projects

**UNC Internal Audit**  
**2016/17 Status of Audit Schedule as of 08/21/16**

**Special Projects & Management Requests**

**Complete**

Auxiliary Equipment (referral from Office of State Auditor)  
Lineberger Cancer Center Grants (referral from Office of State Auditor)  
Law 2016  
Health Behavior

**In Process**

Orthodontics  
Nutrition Research Institute  
Maternal and Infant Health  
NC Institute of Public Health - assistance to management  
Gene Therapy 2016- assistance to management  
Radiology 2016

**On Going**

Multiple Short-term Advisory Projects

REPORT TO THE FINANCE,  
INFRASTRUCTURE, AND  
AUDIT COMMITTEE  
OF THE  
BOARD OF TRUSTEES

Internal Audit Department

University of North Carolina  
at Chapel Hill

September 21, 2016

**UNC - CHAPEL HILL**  
**INTERNAL AUDIT DEPARTMENT**  
**SUMMARY OF AUDIT ACTIVITIES AND PROJECTS COMPLETED AND IN PROCESS**  
**APRIL 18, 2016 TO AUGUST 21, 2016**

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**REVISIONS TO 2015/16 AUDIT PLAN**

Two factors, a necessary increase to hours budgeted for the Follow-up of Prior Internal Audit Findings (600 hours) and not being able to fill two vacant positions when planned (loss of approximately 1,430 hours), significantly affected our ability to complete the audit plan as it was approved in September 2015. As a result, we deferred some of the scheduled projects. Those projects as the reason they were selected for deferral are:

- Cost Transfers – Sponsored Awards: post-implementation activities for ConnectCarolina made an audit of this process inadvisable for fiscal year 2015/16. Since these activities are still in process, we will not include this project in the 2016/17 audit plan.
- Select Agents and Hazardous Materials: use of select agents and hazardous materials is well-managed here which mitigates risk associated with an area that is highly regulated and significant inherent risk. Based on discussions with management, we will replace this project with an audit of export controls in 2016/17.
- Academic Performance Monitoring: management has created several processes that are still evolving, a later audit could be more advantageous
- Title IX Monitoring: fairly new leadership and processes, a later audit could be more advantageous
- Athletics Facilities: lower relative risk. This audit unit has been combined into a broader Facilities Use project that includes other campus facilities, such as lab space.
- Departmental Audit: departmental audits are important but have lower relative risk.

The last four projects will not be carried forward to 2016/17 because of the need to do a post-implementation review of access revocation and to begin doing audits of institutional governance

**COMPLETED**

**Auxiliary Services Equipment** – referred by the Office of the State Auditor – allegations that Auxiliary Services, primarily Dining Services, used state-appropriated funds to purchase equipment used for auxiliary operations.

We determined that the allegations did not have merit. Costs of equipment, renovations, and software licensing fees for most auxiliary operations were charged to related revenue sources. Mail Services is not totally revenue-supported and some of its operating costs were charged to state funds. In our opinion, this practice is appropriate.

We also determined Auxiliary Services allocated part of the cost of the licensing fee for UNC One card software to state funds. In our opinion, this practice is also appropriate because the University uses One Cards for multiple purposes, such as building access, that are not related to a specific revenue source.

**UNC - CHAPEL HILL**  
**INTERNAL AUDIT DEPARTMENT**  
**SUMMARY OF AUDIT ACTIVITIES AND PROJECTS COMPLETED AND IN PROCESS**  
**APRIL 18, 2016 TO AUGUST 21, 2016**

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**Lineberger Cancer Center Grants** - referred by the Office of the State Auditor – allegations of inaccurate and delayed allocations of payroll costs to sponsored funds. We determined that the allegations had merit but ended our work because a team of consultants had reviewed similar issues and a corrective action plan is in process.

**Green Cart** – referred by the Office of the State Auditor – allegations that participant payments were being made in keeping with terms of a program working on sustainable food systems, food access, and health disparities in North Carolina.

We determined that payments were initially delayed due to issues with obtaining the advances used to make the payments. Those issues were resolved and participant payments are up-to-date.

**Follow-up to 2015 Financial Statement Audit Findings** – follow-up to assess adequacy of steps taken to correct findings involving matters related to financial reporting. This project must be complete within 90 days of the date the Office of the State Auditor released its audit report.

The University made satisfactory progress toward correcting findings from the financial statement audit. Some project tasks will not be completed and most financial statement preparation and year-end tasks will not occur until after the end of the 90-day follow-up period. Therefore, we will need to perform an additional assessment of corrective action after the end of the fiscal year to take place concurrently with development of the fiscal year 2016 financial statements and preparation for the 2016 state audit.

**Follow-up to 2015 Federal Compliance Audit Finding** – follow-up to assess adequacy of steps taken to correct lack of certification of time and effort charged to sponsored awards.

This finding has been resolved. 100% of time and effort cards were certified by the due date set by University policy, within the 21-day grace period, or during an escalation period.

**Technical Assistance to the Office of the State Auditor** – data retrieval and preliminary analysis related to projects in two departments.

**Law 2016** – review of allegations regarding travel expenses. We determined that the allegations did not have merit.

However, we identified the need to improve documentation and review of reimbursement requests for trips that combined work-related and personal travel, particularly in relation to cost of airfare. We found one duplicate reimbursement and actual cost reimbursement for some of the meals for a trip within the US. Travelers are eligible only for meal per diem reimbursement for domestic travel unless a meal is part of a business meeting; the meals in question did not. In our opinion, these items were due to review and approval errors. All questioned and erroneous costs have been repaid.

We recommended that found that reimbursement request for travel to a conference include documentation, such as a registration form or conference agenda that shows what meals the conference provided.

**UNC - CHAPEL HILL**  
**INTERNAL AUDIT DEPARTMENT**  
**SUMMARY OF AUDIT ACTIVITIES AND PROJECTS COMPLETED AND IN PROCESS**  
**APRIL 18, 2016 TO AUGUST 21, 2016**

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This practice helps determine which per diem meals and employee should receive. We found no evidence of incorrect meal per diem payments.

Management of the School of Law is implementing these recommendations.

**IN PROCESS**

**Orthodontics** – assistance to management with a review of processes and transactions related to acquisition of dental molds and implants for patient care and instructional purposes. We found that two cases of conflict of interest involving labs used to produce dental molds for Orthodontics and the need for better processes related to how dental labs are selected to provide services. The University no longer does business with the labs involved and one of the employees who had the conflict of interest is no longer with the University. Draft report is in process.

**Clery Act Reporting** – a review of processes used to manage notifications and reporting required by the “Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act”. This project has been delayed by time-sensitive projects requested by management.

**Historically Under-utilized Business Program** – a review of processes used to promote and encourage full and open competition, promote equal access to contracting opportunities among the various contractors and vendors that do business with the University, and ensure compliance with policy a reporting requirements related to this program. This project has been delayed by time-sensitive projects requested by management.

**Follow-up of Prior Internal Audit Findings** – a review and evaluation of steps that management has taken to resolve issues reported from past audits. **Standard 2500 – Monitoring Progress** of *the International Standards for the Professional Practice of Internal Auditing* requires that “the chief audit executive must establish and maintain a system to monitor the disposition of results communicated to management.”

**Nutrition Research Institute** – a review of allegations of incorrect purchasing practices and use of requisitions when needed. Project is in early stages; we have not determined the likely validity of the allegations.

**Radiology 2016** – management request - review of travel costs.

**Technical Assistance to University Management** – data retrieval and preliminary analysis related projects in three departments.

**UNC - CHAPEL HILL**  
**INTERNAL AUDIT DEPARTMENT**  
**SUMMARY OF AUDIT ACTIVITIES AND PROJECTS COMPLETED AND IN PROCESS**  
**APRIL 18, 2016 TO AUGUST 21, 2016**

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**ON-GOING ADVISORY PROJECTS AND COMMITTEE WORK**

- PeopleSoft conversion
- HIPAA Security Liaisons;
- University-wide Committee on the Protection of Personal Data; and
- Multiple short-term projects done to assist management with identifying and managing risks.

**UNC Internal Audit  
Use of Audit Resources  
Summary of Audit Hours Used - FY 2016 as of 06/30/16**

	<b><u>Budgeted</u></b>	<b><u>Hours Charged</u></b>	<b><u>Variance (Over)/Under</u></b>	
Total Hours Available -1-	12,133			
<u>Less:</u> Training & Professional Development	(460)	688	(228)	
<u>Less:</u> Leave	(2,000)	2,446	(446)	-3-
<u>Less:</u> Other Administrative Time -2-	(1,300)	1,175	125	
<b>Total for Leave &amp; Administrative</b>	<b>(3,760)</b>	<b>4,308</b>	<b>(548)</b>	
<b>Hours Available for Projects</b>	<b>8,373</b>			
Routine Audits	3,220	202	3,018	-4-
Annual Projects	1,250	755	495	
Audit Related	1,300	1,743	(443)	
Unplanned Projects	2,700	3,479	(779)	
<b>Total Scheduled/Charged</b>	<b>8,470</b>	<b>6,179</b>	<b>2,291</b>	
<b>Under/&lt;Over&gt; Scheduled</b>	<b>(97)</b>			

-1- = seven staff members at 2080 hours/year adjusted for vacancies and medical leave

-2- = meetings, professional reading, and other office activities

-3- = variance is primarily due to parental leave

-4- = budgeted hours based on being fully staffed in 2nd half of fiscal year but fewer hours available in 1st half due to two vacancies

**Re: Variances**

Routine audits - 600 hours re-allocated to follow-up of prior internal audit findings; 1,430 hours lost from not having vacancies filled by January 1, 2016

Annual Projects - most work related to follow-up or prior internal audit findings will be done after May 2016

Audit Related - more time than budgeted spent on developing data analysis tools and on short-term consulting

Unplanned Projects - more time needed to complete projects than initially projected; in some cases projects were reopened due to subsequent, related events.

# **UNC Internal Audit**

## **2015/16 Audit Schedule as of 06/30/16**

### **Planned Audits**

#### **Complete**

Large Equipment Repair Contract

#### **In Process**

Historically Underutilized Business Program

Clery Act Reporting

#### **Deferred - see Summary of Audit Activities for information about how projects were selected to be deferred.**

Cost Transfers - Sponsored Awards

Department Audit - TBN

Athletics Facilities

Academic Performance Monitoring

Title IX Monitoring

Select Agents and Hazardous Materials

### **Annual Projects**

#### **Complete**

2014 Office of the State Auditor A-133 Follow-up (added)

2015/16 Risk Assessment and Audit Plan

Follow-up for 2015 OSA Audit (added)

#### **On-Going**

Enterprise Resource Planning

#### **In Process**

Follow-up for Prior Internal Audit Findings

2016/17 Risk Assessment and Audit Plan (added)

2016 State Audit (added)

#### **Cancelled - UNC-CH did not have a site visit in FY 2016**

UNC Business Compliance Program 2016

### **Audit Related**

#### **Complete**

Ethics and Integrity Task Force

Policies and Procedures Committee

Chief Privacy Officer Search Committee

Exec. Director for Enterprise Financial Reporting Search

OSR Compliance and Training Officer

**UNC Internal Audit**  
**2015/16 Audit Schedule as of 06/30/16**

**On Going**

Continuous Auditing  
Office Systems  
HIPAA Security Liaison  
University Committee on the Protection of Personal Data  
IT Governance Committee & Data Custodian Work  
Privacy Liaison  
CERTIF (PCI Standards)  
Audit Committee  
Audit Process Improvement  
HIPAA Risk Assessment  
KPI Reporting  
UNCAA Conference Planning (added)  
Multiple short-term advisory projects

**Special Projects & Management Requests**

**Complete**

Energy Services 2015  
Environmental Sciences & Engineering #2  
Learn NC  
Health Promotion and Disease Prevention  
Coal Sorbent Contract  
Anesthesiology  
Health Behavior (assist Office of the State Auditor)  
HPDP - Green Cart  
Gene Therapy - Bamboo (new)

**In Process**

Orthodontics  
Auxiliary Equipment (referral from Office of State Auditor)  
Lineberger Cancer Center Grants (referral from Office of State Auditor)  
Law 2016 (new)  
Nutrition Research Institute (new)  
Multiple short-term special projects

**Resolution of the Board of Trustees of the University of North Carolina at Chapel Hill  
to Delegate Expanded Authority to the Chancellor  
for Certain Salary Actions  
for Employees Exempt from the State Human Resources Act**

WHEREAS, pursuant to N.C.G.S. 116-11(2), the UNC Board of Governors is responsible for the general determination, control, supervision, management and governance of all affairs of the constituent institutions; and

WHEREAS, the UNC Board of Governors has adopted policies relevant to salary actions for employees exempt from the State Human Resources Act ("EHRA employees") that delegate certain actions to the President and/or boards of trustees, and on July 29, 2016, approved changes to Sections 200.6 and 600.3.4 of the UNC Policy Manual that raised the thresholds at which proposed salary increases for EHRA employees may be approved by the President and authorized the President to delegate all or a portion of such authorities to the boards of trustees consistent with its authority under N.C.G.S. 116-11(13), as necessary or prudent to enable the institution to function in a proper and expeditious manner ; and

WHEREAS, consistent with the UNC Board of Governors' authorization, the President has determined that it is necessary and prudent to delegate to the boards of trustees of the constituent institutions the authority to approve individual EHRA employee salary adjustments within the following limits:

- a) A temporary salary stipend or supplement with a specified end date that does not exceed 25% and \$25,000 of cumulative salary adjustments fiscal year to-date based on the employee's June 30 salary, up to 12-months in duration; and
- b) A temporary salary stipend or supplement without a specified end date that does not exceed 20% and \$15,000 of cumulative salary adjustments fiscal year to-date based on the employee's June 30 salary; and
- c) A permanent base salary adjustment that does not exceed 20% and \$15,000 of cumulative salary adjustments fiscal year to-date based on the employee's June 30 salary; and

WHEREAS, on September 13, 2016, the President authorized the Board of Trustees, at its option, to further delegate any or all of the above authorities to approve salary adjustments, with the exception of adjustments for Tier I Senior Academic and Administrative Officers, to the Chancellor and the Chancellor's permitted designees identified in the paragraph below, as deemed necessary for the proper and expeditious operation of the institution;

NOW THEREFORE, after careful consideration, the University of North Carolina at Chapel Hill Board of Trustees hereby further delegates to the Chancellor and the Chancellor's permitted designees

the authority to approve EHRA salary adjustments up to the aforementioned limits. This delegation shall remain in effect until modified or rescinded by the Board of Governors, President, or Board of Trustees. For purposes of this Resolution, the Chancellor's permitted designees shall be the following senior officers of UNC Chapel Hill: provost and chief human resources officer. The Board of Trustees or its designated committee shall receive an informational report quarterly of all EHRA employee salary adjustments approved by the Chancellor and/or the Chancellor's permitted designees under this delegation.

BE IT SO RESOLVED.

9/22/ 2016

APPROVED BY THE BOARD OF TRUSTEES OF THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

By: Wayne Pinkney  
Secretary of the University

(Seal)



THE UNIVERSITY  
of NORTH CAROLINA  
at CHAPEL HILL


OFFICE OF THE EXECUTIVE  
VICE CHANCELLOR AND PROVOST

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www.unc.edu/provost

# MEMORANDUM

TO: Dwight Stone, Chair, Board of Trustees of the University of North Carolina at Chapel Hill  
Chuck Duckett, Chair, University Affairs Committee, Board of Trustees of the University of North Carolina at Chapel Hill

FROM: James W. Dean, Jr., Executive Vice Chancellor and Provost 

RE: Authorization to Plan the Global Business Center

DATE: September 8, 2016

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Creating a new center or institute within the UNC system requires a two-step process involving first a request for authorization to plan and then a request for authorization to establish the new unit. Authorization to plan is granted by the Chancellor and Provost, with notification to the Board of Trustees. Authorization to establish the new center or institute is given by the Chancellor, the Provost, and the Board of Trustees.

I write now to notify the Board of Trustees that Chancellor Folt and I have approved a request for authorization to plan a new interdisciplinary center in Kenan-Flagler Business School that is called the Global Business Center (GBC). The Centers and Institutes Review Committee reviewed the request and agreed unanimously to recommend that it be granted.

The request for authorization to plan was submitted by Jay Swaminathan, GlaxoSmithKline Distinguished Professor of Operations. The GBC's mission would be to increase the global competency of business students, faculty, and staff, with a focus on emerging markets that are relevant to businesses in North Carolina and the United States. The GBC would coordinate cross-unit collaboration to advance Kenan-Flagler's global education strategy, support curricular development, and promote and disseminate research on global issues. In addition, the GBC would reach beyond the walls of the business school to serve and collaborate with partners across the University, the state, and worldwide. The GBC would be categorized as an instructional center but also would be engaged in research and public service.

The GBC's predecessor organization was the Center for International Business Education and Research (CIBER), which was funded entirely through the US Department of Education. That grant ended and activities previously funded by the grant are now supported by Kenan-Flagler Business School and the Office of the Executive Vice Chancellor and Provost.

Copy: Dwayne Pinkney, Vice Provost for Finance and Academic Planning and Secretary of the University  
Carol Tresolini, Vice Provost for Academic Initiatives and Chair, Center and Institutes Review Committee

The University of North Carolina at Chapel Hill

EXECUTIVE SUMMARY

Board of Trustees

September 22, 2016

ATTACHMENT M

Appendix A

No.	College/Division	Name	Dept./School	Current Rank	New Rank	Tenure Request Reason	Effective Date	Salary
<b>Personnel Actions</b>								
<b>New Appointments without Tenure</b>								
1	Academic Affairs	Ehssan Nazockdast	Applied Physical Sciences	N/A	Assistant Professor		7/1/2017	\$88,000.00
2	Health Affairs	Sachiko Ozawa	Pharmacy	N/A	Associate Professor		9/26/2016	\$135,000.00
<b>Addition of Joint Appointment without Tenure</b>								
0								
<b>Promotion to Full Professor</b>								
1	Health Affairs	Suzanne Maman	Health Behavior	Associate Professor	Professor		10/1/2016	\$150,178.00
<b>Reappointments to the same Rank</b>								
1	Health Affairs	Jennifer Lund	Epidemiology	Assistant Professor	Assistant Professor		10/1/2017	\$108,962.00
2	Health Affairs	Kimberly Powers	Epidemiology	Assistant Professor	Assistant Professor		9/1/2017	\$108,962.00
<b>Designation/Reappointments to Departmental Chair</b>								
1	Health Affairs	Henrik Dolman*	Pharmacology/Biochemistry & Biophysics	Professor	Professor		10/1/2016	\$162,740.00
2	Health Affairs	Barbara Turpin	Environmental Sciences & Engineering	Professor	Chair		9/1/2016	\$164,000.00
<b>Designation/Reappointments to Distinguished Professorship</b>								
1	Health Affairs	Robert Esther	Orthopaedics	Clinical Associate Professor	H. Robert Brashear Distinguished Term Professorship in Orthopaedics		9/23/2016	\$319,811.00
2	Health Affairs	Timothy Hoffman	Pediatrics	Professor	Governors Club Distinguished Professorship in Pediatric Cardiology		9/23/2016	\$367,869.00
3	Health Affairs	Andre Ritter	Dentistry	Professor	Thomas P. Hinman Distinguished Professor in Restorative Dentistry		10/1/2016	\$173,549.00
4	Health Affairs	Nicholas Shaheen	Medicine	Professor	Mary Kay & Eugene Bozymski and Linda & William Heizer Distinguished Professor in the Department of Medicine		10/1/2016	\$351,423.00
<b>Actions Conferring Tenure</b>								
<b>Promotion Conferring Tenure</b>								
1	Health Affairs	Liza Hayes Makowski	Nutrition	Assistant Professor	Associate Professor	Promotion based on excellence in research	1/1/2017	\$107,450.00
<b>New Appointments Conferring Tenure</b>								
1	Health Affairs	Melina Kibbe	Surgery	Nominated Clinical Professor	Professor	Appointment based on excellence in research	11/1/2016	\$510,000.00
<b>Departmental Transfer</b>								
1	Health Affairs	Henrik Dohlman*	Pharmacology/Biochemistry & Biophysics	Professor	Professor		10/1/2016	\$162,740.00
<b>Addition of Joint Appointment Conferring Tenure</b>								
0								
<b>Corrections</b>								

**The University of North Carolina at Chapel Hill**  
**EXECUTIVE SUMMARY**  
**Board of Trustees**  
**July 14, 2014**

**Appendix B**

No.	College/Division	Name	School	Department	Rank	Reason	Requested Amount of Increase **	Percent of Increase **	June 30 Salary	Current Salary	New Salary *	Effective Date
<b>Compensation Actions</b>							*Available funding for each action has been confirmed by the appropriate Department and School/Division management officials to support the proposed salary increase. Upon implementation, specific funding sources are reviewed and approved at the Department level, as well as by the applicable University Central financial offices, including the University Budget Office and the Office of Sponsored Research for grant-funded salaries.					
							** Based on cumulative increase(s) to 6/30 salary					
1	Health Affairs	Allison Amos	Medicine	Radiation Oncology	Research Project Manager	Increase due to new faculty appointment as Clinical Assistant Professor via external competitive event	\$15,000	27.27%	\$55,000	\$60,500	\$70,000	10/1/2016
2	Health Affairs	Henrik Dolhman	Medicine	Pharmacology	Professor	Increase due to new secondary administrative appointment as Department Chair via external competitive event	\$116,703	71.47%	\$163,297	\$165,366	\$175,000	10/1/2016
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No.	College/Division	Name	Department/School	Rank	Reason	Total Monetary Value of Non-Salary Compensation	Duration of Non-Salary Compensation	Effective Date	End Date
<b>Non-Salary Compensation Actions</b>									
0	N/A	N/A	N/A		N/A	N/A	N/A		N/A

**EXECUTIVE SUMMARY**

*Board of Trustees*

*July 14, 2014*

No.	College/Division Name	Department/School	Rank	Description
<b>For Information</b>				
0	N/A	N/A	N/A	N/A





THE UNIVERSITY  
of NORTH CAROLINA  
at CHAPEL HILL

OFFICE OF THE EXECUTIVE VICE CHANCELLOR  
AND PROVOST

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ATTACHMENT N

## MEMORANDUM

To: Annual Raise Process (ARP) Listserv

From: Barron Matherly, Assistant Provost for Finance  
Ann Lemmon, Interim Assistant Provost for Human Resources  
Linc Butler, Associate Vice Chancellor for Human Resources

Re: Fiscal Year 2016-17 EHRA Faculty and Non-Faculty Compensation Guidelines

Date: August 11, 2016

As you know, the FY2016-17 state budget was approved on July 14, 2016. Included within the budget is legislation that provides for a 1.5% across the board (ATB) legislative increase (LI), a .5% ATB one-time bonus, and a merit based one-time bonus that averages 1%. Earlier today, the Executive Vice Chancellor & Provost and the Vice Chancellor for Workforce Strategy, Equity and Engagement communicated UNC-CH EHRA salary increase protocols for this year. This memorandum provides guidance for the implementation of the LI, as well as the Annual Raise Process (ARP), for FY2016-17. The LI and ARP will be implemented separately and in different months. Instructions regarding bonus payments will be communicated at a later date pending guidance received from UNC-General Administration (GA).

### EHRA LI Guidelines

1. The LI provides for a 1.5% ATB salary increase for all permanent full-time and part-time EHRA employees.
2. Permanent part-time employees will receive a pro-rated LI.
3. The LI will be calculated on the June 30, 2016 base salary and included in the **August** payroll retroactive to July 1, 2016.
4. **The LI will be systematically applied in ConnectCarolina using August salary sources; thus campus units will not process actions or enter data.**
5. Supplemental payment adjustments are not part of the LI process.
6. Faculty in the Phased Retirement Program are not included in the LI process.

7. Employees that are above the maximum of their salary range will receive the full amount of the LI. The current Senior Academic and Administrative Officers (SAAO) Tier I and Tier II salary ranges established by GA will not be updated by the 2016 LI.
8. Employees that separated from state service prior to July 1, 2016 or were hired July 1, 2016 or later are not eligible for the LI.
9. Performance ratings and disciplinary actions are not factored into the LI.
10. Employees that are on leave without pay will receive the LI when they return from leave on a current basis (not retroactive to July 1, 2016).
11. The LI must be applied before any other personnel action such as promotions or reallocations with the same July 1, 2016 effective date or later.
12. In the event a July 1, 2016 personnel action has already been implemented through payroll, then the LI will be calculated on the June 30, 2016 base salary and added as a flat amount to the already processed personnel action.
13. The LI will not be considered cumulative with the June 30, 2016 salary when evaluating future salary increases this fiscal year.
14. The Office of Budget, Planning and Analysis will communicate information regarding the budget distribution process for the LI.

#### EHRA ARP Guidelines

1. The ARP is not a UNC system requirement and is at the discretion of the Chancellor.
2. The ARP applies to permanent full-time and part-time EHRA employees who were in active employment status as of January 1, 2016 and remain active in the month that the ARP is implemented.
3. Temporary EHRA employees are not eligible for the ARP.
4. The ARP will be calculated on the pre-LI June 30, 2016 base salary and included in the **September** payroll retroactive to July 1, 2016.
5. The Academic Personnel Office (EHRA Faculty HR) and the Office of Human Resources (EHRA Non-Faculty HR) will each distribute a spreadsheet identifying permanent EHRA employees by School/Division to all School/Division HR Officers and MOU Leads on **August 15, 2016**. The spreadsheets will require entries related to the proposed ARP salary increase for each EHRA employee receiving an increase. School/Division HR Officers and MOU Leads should work together to complete the spreadsheets. Upon completion, the spreadsheets should be signed by the Dean, Vice Chancellor or designee, and returned to the Academic Personnel Office (for EHRA Faculty employees) at [apo@unc.edu](mailto:apo@unc.edu) or to the Office of Human Resources (for EHRA Non-Faculty employees) at [epanfsalaryrequest@unc.edu](mailto:epanfsalaryrequest@unc.edu) by **August 24, 2016 at 12:00 p.m.** School/Division HR Officers and/or MOU Leads will be contacted regarding any spreadsheet discrepancies.

6. The spreadsheets will be uploaded into ConnectCarolina using September salary sources approximately September 2, 2016.
7. School/Division HR Officers and MOU Leads should work together to implement the ARP for their areas of responsibility within the indicated timeframe. This includes communication between campus units that have EHRA employees with primary and secondary appointments.
8. All base salary increases on the ARP must come from existing campus unit resources. No additional funding will be allocated.
9. Supplemental payment adjustments are not part of the ARP.
10. Any ARP increase must be awarded on an individual employee basis at management's discretion. There are no employee entitlements and the ARP **cannot** be implemented ATB.
11. Any ARP increase must be based on the following criteria:
  - Individual meritorious performance (including teaching, service, publications, and/or research productivity for faculty)
  - Retention of key or hard to recruit personnel.
  - Secondary criteria that may be considered include equity and labor market.
12. Any ARP increase plus the 1.5% LI **cannot** result in a new salary that exceeds 10% of the employee's June 30, 2016 base salary (thus, there is a cap of 8.5% for ARP increases). No one-time bonus payments are to be included in this calculation.
13. Previously approved faculty rank promotions are not included on the ARP and therefore do not count toward the ARP 8.5% cap.
14. All post-ARP salary increase actions must be processed on a current basis and per regular salary increase procedures.
15. An ARP increase may not exceed an established EHRA employee salary range.
16. Annual salary adjustments tied to BOT and/or BOG approved faculty incentive pay plans or other special BOT/BOG approved special compensation plans are exempt from the ARP guidelines and should follow the provisions of those plans.
17. Faculty that entered Phased Retirement on July 1, 2016 are not eligible for the ARP. However, faculty members who entered the Phased Retirement Program in 2015 or prior years are eligible for salary increases and merit pay based on annual evaluations.
18. Salary increases for EHRA Non-Faculty Research employees in positions assigned to Levels 1, 2 or 3 in the Social Sciences Research, Health Sciences Research and Physical Sciences Research job families may exceed the job level maximum up to the reference rate of the next highest job level within the same job family. The reference rate may **only** be exceeded by the amount of the 1.5% LI.
19. Salary increases for EHRA Non-Faculty Research employees in positions assigned to Level 4 may exceed the job level maximum for **only** the amount of the 1.5% LI. Annual salaries may not exceed the maximum for any other portion of the ARP.

20. Salary increases for EHRA Non-Faculty Instructional and Public Service employees may exceed the job level maximum for **only** the amount of the 1.5% LI. Annual salaries may not exceed the maximum for any other portion of the ARP.
21. Salary increases for EHRA Non-Faculty Senior Academic Administrative Officers (Tier I and II) may exceed the job level maximum for **only** the amount of the 1.5% LI. Annual salaries may not exceed the maximum for any other portion of the ARP.
22. No ARP increase can be officially communicated to EHRA employees until authorization is provided by the Academic Personnel Office (for EHRA Faculty employees) or the Office of Human Resources (for EHRA Non-Faculty employees).
23. All ARP increases must be specifically included in the relevant quarterly salary increase report provided to GA. It is possible that we may also need to provide a summary of ARP activity in advance of the quarterly reporting cycle if GA receives a time sensitive request for this information.
24. Retroactive funding swaps can be made beginning **September 29, 2016** by using the Payroll Accounting Adjustment Tool (PAAT).

ARP listserv subscribers, School/Division HR Officers and Secondary Contacts, MOU Leads, and the ARP Steering Committee will receive necessary updates during the ARP. Karen Stone in the Office of the Executive Vice Chancellor & Provost should be contacted at [karen\\_stone@unc.edu](mailto:karen_stone@unc.edu) regarding subscribing and unsubscribing to the ARP listserv. ARP users in the College of Arts & Sciences, School of Medicine, School of Public Health, and Vice Chancellor for Research (VCR) do not subscribe to the ARP listserv but receive ARP related communications from their dean's office or Office of the VCR.

**Detailed instructions regarding the FY2016-17 ARP, including processing actions in ConnectCarolina, and spreadsheet and data entry for FTE changes, are forthcoming.**

- c: Dwayne Pinkney, Vice Provost for Finance & Academic Planning and Secretary of the University
- Wendy Andrews, Executive Business Manager, Office of the EVC & Provost
- School/Division HR Officers and Secondary Contacts
- MOU Leads
- ARP Steering Committee

SAAO I Annual ARP Increases  
Proposed for 2016-2017

Name	Title	Annual Base Rate as of 6/30/16	Annual Supplement/ Bonus	Total Salary of All Jobs	Proposed ARP Base Salary	Total Supplements	Proposed Total Salary After ARP	% Change Based on ARP Action	Comments	Range Minimum	75th Percentile/Market Reference Rate	Range Maximum
Cunningham, Bubba	Director of Athletics	\$642,268		\$642,268	\$651,902		\$706,662	9.90%	increase must be funded by Athletics as he is not paid on state or F&A funds	\$450,268	\$630,375	\$810,482
Cone, Judith	Vice Chancellor for IEED	\$282,852		\$282,852	\$310,854		\$310,854	9.90%		\$231,152	\$346,727	\$462,303