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Curriculum Proposal Approval Process

Departmental discussion/planning

Dean’s review & approval

Level I

Submit full proposal via Coursedog for fall/spring curriculum deadline

Level II: full proposal stage

Provost’s initial review & approval

Level II: RTP stage

ASCRC/Grad Council and Faculty Senate review & approval

Submit one-paragraph description to Office of the Provost for Forthcoming Academic Proposals Spreadsheet (by mid-May)

Provost’s review & approval of RTP

BOR review & approval of RTP (September meeting*)

OCHE review & approval (submission dates available monthly)

Implementation of change:
- Office of the Provost sends OCHE memo announcing approval
- Registrar adds to next possible catalog
- Office of the Provost and Department update website and program inventory
- Department works with Marketing/Admissions to promote new program

*See Optimal Level II Timeline
Montana University System (MUS) Curriculum Change Policy

According to [Montana Board of Regents Policy 303.1](https://www.mt.gov/boards/montana-board-of-regents/policies), the Commissioner of Higher Education (OCHE) and the Board of Regents (BOR) are responsible for monitoring and approving proposals for new offerings and modifications to existing offerings. The Office of the Provost coordinates UM’s proposals for submission to BOR. Proposal types are categorized depending on the level of the involvement of OCHE and BOR.

**Proposal Type by Level (Table)**

<table>
<thead>
<tr>
<th>Level</th>
<th>Campus Approvals</th>
<th>OCHE Approvals</th>
<th>Request to Plan and Level II</th>
</tr>
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<tbody>
<tr>
<td>I</td>
<td>Placement of a postsecondary educational program into moratorium</td>
<td>Re-titling an existing postsecondary educational program</td>
<td>Establishing a new postsecondary educational program</td>
</tr>
<tr>
<td></td>
<td>Withdrawing a postsecondary educational program from moratorium</td>
<td>Terminating an existing postsecondary educational program</td>
<td>Forming, eliminating, or consolidating an academic, administrative, or research unit</td>
</tr>
<tr>
<td></td>
<td>Establishing, re-titling, terminating, or revising a campus certificate of 29 credits or less</td>
<td>Consolidating existing postsecondary educational programs</td>
<td>RTP Required</td>
</tr>
<tr>
<td></td>
<td>Establishing a B.A.S./A.A./A.S. area of study</td>
<td>Establishing a new minor where there is a major or an option in a major</td>
<td>Permanent authorization of a temporary C.A.S. or A.A.S. degree program</td>
</tr>
<tr>
<td></td>
<td>Offering an existing postsecondary educational program via distance or online delivery</td>
<td>Revising a postsecondary educational program</td>
<td>Exceeding the 120-credit maximum for baccalaureate degrees</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Establishing a temporary C.A.S. or A.A.S. degree program</td>
<td>Re-titling an academic, administrative, or research unit</td>
</tr>
</tbody>
</table>

*Source: MUS Academic Affairs Procedural Guidebook*

Additional details and definitions are available in the [MUS Academic Affairs Procedural Guidebook](https://www.mt.gov/boards/montana-board-of-regents/policies).
<table>
<thead>
<tr>
<th>Proposal Type</th>
<th>Change Requested</th>
<th>Forms Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level I, Campus Approval</td>
<td>Placement of a postsecondary educational program into moratorium</td>
<td>Academic Proposal Request Form, Program Termination/Moratorium Form</td>
</tr>
<tr>
<td>Level I, Campus Approval</td>
<td>Withdrawing a postsecondary educational program from moratorium</td>
<td>Academic Proposal Request Form</td>
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<td>Level I, OCHE Approval</td>
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</tr>
<tr>
<td>Level I, OCHE Approval</td>
<td>Establishing a temporary C.A.S. or A.A.S. degree program</td>
<td>Academic Proposal Request Form</td>
</tr>
<tr>
<td>Level II, RTP Required</td>
<td>Establishing a new postsecondary educational program</td>
<td>Request to Plan, Academic Proposal Request Form, Curriculum Proposal Form, Fiscal Analysis Form, Required Courses Form</td>
</tr>
<tr>
<td>Level II, RTP Required</td>
<td>Forming, eliminating, or consolidating an academic, administrative, or research unit</td>
<td>Request to Plan, Academic Proposal Request Form, Center/Institute Proposal Form (for centers/institutes only)</td>
</tr>
<tr>
<td>Level II, RTP Not Required</td>
<td>Permanent authorization of a temporary C.A.S. or A.A.S. degree program</td>
<td>Academic Proposal Request Form, C.A.S./A.A.S. Curriculum Proposal Form, Fiscal Analysis Form, Required Courses Form</td>
</tr>
<tr>
<td>Level II, RTP Not Required</td>
<td>Exceeding the 120-credit maximum for baccalaureate degrees</td>
<td>Academic Proposal Request Form</td>
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<td>Academic Proposal Request Form</td>
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University of Montana (UM) Curriculum Approval Process

The first step to any curriculum proposal is working with the Office of the Provost to identify which type of change you are making. Please consult Hadley Jackson (hadley.jackson@mso.umt.edu) before completing any paperwork to ensure you are taking the correct route. This will prevent you from completing unnecessary forms and/or needing to make significant revisions down the road.

Level I
Level I changes must undergo review by ASCRC (undergraduate programs) or Graduate Council (graduate programs) and the full Faculty Senate before moving through the state-level review process. Faculty Senate has two curriculum deadlines per academic year, one in the fall and one in the spring, which are posted on the Faculty Senate website.

Once a proposal is submitted on Coursedog, it will be automatically routed for review and approval by (1) the Department Chair; (2) the Dean; (3) the committee (ASCRC/Grad Council); (4) the full Faculty Senate; (5) the Provost; and (6) the President. Upon final approval, the Offices of the Provost and President will coordinate submission to OCHE at the next possible opportunity.

OCHE accepts Level I proposals on a monthly basis (OCHE schedule of submission deadlines). Level I proposals are discussed on monthly Chief Academic Officer (CAO) calls with representatives from other MUS institutions. Proposal authors may be asked to attend the CAO call to answer questions about their proposal. After the CAO call, the Office of the Provost will send OCHE’s approval memo to the proposal author and other relevant parties, prompting implementation of the change.

Level II: RTP Stage
Most Level II changes require a Request to Plan (RTP), followed by initial Board of Regents (BOR) comment and approval, before undergoing campus-level review. The Faculty Senate does not review proposals at the RTP stage. Proposal authors should send a one-paragraph description of the new program to the Office of the Provost by mid-May for inclusion in UM’s Forthcoming Academic Proposals spreadsheet, which is submitted to BOR each May with the Academic Priorities and Planning Statement. Exact deadlines are posted on the Office of the Provost’s webpage.

Requests to Plan should be submitted on Coursedog in mid-May for consideration at the September BOR meeting (see Optimal Level II Timeline). Exact deadlines are posted on the Office of the Provost’s webpage. Once an RTP is submitted, it will be automatically routed for review and approval by (1) the Dean; (2) the Provost; and (3) the President. Upon final approval, the Offices of the Provost and President will coordinate submission for the September BOR meeting (OCHE schedule of submission deadlines).

Requests to Plan receive comment from other MUS institutions at the CAO call in preparation for the BOR, which is held two weeks before the BOR meeting. They will then be discussed at the Academic, Research, and Student Affair (ARSA) committee BOR call, which is held one week before the BOR meeting. Final discussion and approval of RTPs happens at the September BOR meeting. Exact call and meeting dates are available on OCHE’s schedule of submission deadlines. Proposal authors will be asked
to attend the CAO BOR call, the ARSA BOR call, and possibly the BOR meeting to answer any questions. After the BOR meeting, the Office of the Provost will send OCHE’s approval memo to the proposal author, chair, and dean, initiating the full proposal stage.

Level II: Full Proposal Stage
Following RTP approval at the September BOR meeting, Level II proposals follow the same process as Level I proposals. Full Level II proposals should be submitted on CourseDog for Faculty Senate’s fall curriculum deadline. Once submitted, the proposal will be automatically routed for review and approval by (1) the Department Chair; (2) the Dean; (3) the committee (ASCRC/Grad Council); (4) the full Faculty Senate; (5) the Provost; and (6) the President. Upon final approval, the Offices of the Provost and President will coordinate submission to OCHE at the next possible opportunity.

OCHE accepts Level II proposals on a monthly basis (OCHE schedule of submission deadlines). Level II proposals are discussed on monthly CAO calls with representatives from other MUS institutions. Proposal authors may be asked to attend the CAO call to answer questions about their proposal. After the CAO call, the Office of the Provost will send OCHE’s approval memo to the proposal author and other relevant parties, implementing the change.

There are some types of Level II changes that do not require RTPs (see MUS Curriculum Change Policy). They will follow the monthly OCHE approval timeline described above, with the exception of proposals to re-title academic, administrative, or research units. These proposals require a BOR vote and are due seven weeks prior to a BOR meeting. See the MUS Academic Affairs Procedural Guidebook and OCHE schedule of submission deadlines for more information.

Forms
All forms required for all types of curriculum change proposals are available on CourseDog and should be submitted and approved on CourseDog. However, some proposers may wish to draft initial versions as word documents or view word versions of forms for reference. See the Required Forms by Proposal Type table for additional guidance.

The word versions of all forms are available on the OCHE forms webpage, unless noted otherwise.

- Academic Proposal Request Form
- Curriculum Proposal Form
- C.A.S./A.A.S. Curriculum Proposal Form
- Fiscal Analysis Form
  - Required Courses Form (This is an internal UM form that can be found on the Office of the Provost’s webpage.)
- Program Termination/Moratorium Form
- Research Center and Institute Proposal Form
- Request to Plan Form
Optimal Level II Timeline
OCHE approves Level II proposals on a monthly rolling basis while UM’s campus-level processes and deadlines happen semesterly. There is some flexibility in the timeline for RTP submission, but the optimal timeline is outlined below. Following this timeline is the surest way to guarantee implementation of the new program for the following academic year. For example, if an RTP is submitted in May 2021 and is approved at each stage, the program will be implemented for AY22-23.
Coursedog Instructions

Signing In
Sign in to app.coursedog.com with your umontana alias. Note that this field is case-sensitive, so you should use all lowercase characters.

The system will redirect you to sign in with your NetID on the single sign on page.

If you are prompted to select a platform, choose Curriculum. If you are not prompted, you will be automatically routed to the Curriculum dashboard.
Submitting a Proposal
From the Curriculum dashboard, select “new proposal” on the right sidebar.

You will be prompted to select one of four choices from the Montana Form Workflow dropdown: Request to Plan; General Education Forms; Service Learning Form; Curriculum Change Proposal (Level I and Level II Changes). The following sections detail processes for each option.

See the Saving Proposal Drafts section to learn how to save proposals to return to them later.

Request to Plan
For an explanation of the Request to Plan (RTP) process, see the Level II: RTP Stage section. Additional information is available in MUS Academic Affairs Procedural Guidebook.

To submit an RTP, select “Request to Plan” from the Montana Form Workflow dropdown and choose “go to form.” There is only one form required for an RTP. (See the Form FAQs section for additional notes.)
Once all fields are complete, submit the form using the “Submit Proposal” button on the right sidebar. If any of your entries do not meet the fields’ requirements, you will not be allowed to submit the form. Confirm that all required fields (indicated by a red asterisk) are complete.

Once submitted, the proposal will be automatically routed through approval steps. See the Checking the Status of a Proposal section to learn about form routing.

**Level I**
For an explanation of Level I proposals, see the Level I section. Additional information is available in MUS Academic Affairs Procedural Guidebook.

To submit a Level I proposal, select “Curriculum Change Proposal (Level I and II Changes)” from the Montana Form Workflow dropdown.
The next step will ask, “What change do you want to make?” The dropdown lists all possible Level I and II curriculum changes. To identify the change you would like to make, see the MUS Curriculum Change Policy section.

Answer the questions according to your selected change until you reach the forms. Some Level I changes require multiple forms. For example, a termination/moratorium proposal requires an Academic Proposal Request Form and a Termination/Moratorium Form. **You must navigate through the Workflow separately for each form.**

For the termination/moratorium example, if you submit the Academic Proposal Request Form, your proposal is not complete. You should return to the Curriculum dashboard, follow the appropriate workflow steps, and complete the Termination/Moratorium Form. (See the Form FAQs section for additional notes.)

Once all fields are complete, submit the form using the “Submit Proposal” button on the right sidebar. If any of your entries do not meet the fields’ requirements, you will not be allowed to submit the form. Confirm that all required fields (indicated by a red asterisk) are complete.

Once submitted, the proposal will be automatically routed through approval steps. See the Checking the Status of a Proposal section to learn about form routing.
Level II
For an explanation of Level II proposals, see the Level II: Full Proposal Stage section. Additional information is available in the MUS Academic Affairs Procedural Guidebook.

To submit a Level II proposal, select “Curriculum Change Proposal (Level I and II Changes)” from the Montana Form Workflow dropdown.

The next step will ask, “What change do you want to make?” The dropdown lists all possible Level I and II curriculum changes. To identify the change you would like to make, see the MUS Curriculum Change Policy section.
Answer the questions according to your selected change until you reach the forms. Most Level II changes require multiple forms. For example, a new major/degree proposal requires an Academic Proposal Request Form, a Curriculum Proposal Form, a Fiscal Analysis Form, and a Required Courses Form. **You must navigate through the Workflow separately for each form.**

For the new major/degree example, if you submit the Academic Proposal Request Form, your proposal is not complete. You should return to the Curriculum dashboard, follow the appropriate workflow steps, and complete the Curriculum Proposal Form. You should then return once again to complete the Fiscal Analysis Form and Required Courses Form. (See the [Form FAQs](#) section for additional notes.)

Once all fields are complete, submit the form using the “Submit Proposal” button on the right sidebar. If any of your entries do not meet the fields’ requirements, you will not be allowed to submit the form. Confirm that all required fields (indicated by a red asterisk) are complete.

Once submitted, the proposal will be automatically routed through approval steps. See the [Checking the Status of a Proposal](#) section to learn about form routing.

### Checking the Status of a Proposal

From the Curriculum Dashboard, select “my proposals” on the right sidebar.

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**Good Afternoon, Hadley**

Have any questions, visit the Help Center.

Nice! You’re up to date! There is nothing to do at the moment.

---

**Actions**

+ NEW PROPOSAL
  - MY PROPOSALS (0)
  - SETTINGS

**Upcoming**

No Upcoming Agendas

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You will be redirected to the “Proposals” page, which has five additional views. Proposals you have submitted will be listed on the “Created By Me” page. The green and yellow checkboxes under “Decisions” indicate the proposal’s progress in the workflow.
If you select the proposal, you will see your full proposal on the left and the “Proposal Toolbox” on the right. The Toolbox gives you various options for how to view the proposal’s progress. The “Workflow” view shows the status of each workflow step.

**Saving Proposal Drafts**
Coursedog will automatically save proposal drafts when you navigate away from the form. You can access your drafts at any time by selecting the “Drafts” page under the left Curriculum Management sidebar.

When drafting a proposal, it is helpful to complete the “Program Title” field first, so the names of your proposals appear in your list of drafts.
Form FAQs
Word document versions of all forms are available on OCHE’s Academic Forms webpage. It may be helpful to use the word document for drafting and collaboration. All final submissions should be on Coursedog.

General
Fields on the “General” card appear on every form. These fields collect information necessary for implementing and tracking the program. You should enter the same information into these fields on every form required for your proposal.

- Find the appropriate CIP (Classification of Instructional Programs) Code using the CIP user site. The link to the site is also provided in the form.
- If you are proposing an interdisciplinary program and are unsure of which college or department to select, consult the Office of the Provost for guidance.
A.A.S./C.A.S. Curriculum Proposal Form
The A.A.S./C.A.S. Curriculum Proposal Form is required for proposals to seek permanent authorization of a temporary A.A.S. or C.A.S. degree. Programs granted temporary authorization must seek permanent authorization within two years.

- The “Implementation of the Program” card asks for projections of program headcounts and graduates. You should consult UMOnline, as they will provide data that will help justify your projections to BOR. BOR will follow up once the program is implemented to check on the accuracy of projections.
  - Review “Level II Academic Program Follow-Up” in the MUS Academic Affairs Procedural Guidebook for details (pp. 12-13).

Academic Proposal Request Form
The Academic Proposal Request Form is required for all Level I and II changes.

- On the “Proposal Summary” card, there is a question regarding resources. If you are requesting new resources, they should already be approved by your Dean.
- Also on the “Proposal Summary” card, you are required to upload catalog language. The Registrar’s Office will use the language you provide to update/create the program’s entry in the UM Course Catalog, so the language should be accessible to students.

Center/Institute Proposal Form
The Center/Institute Proposal Form is required for creation or consolidation of a center/institute.

- Before beginning work on your proposal, review Appendix B of the MUS Academic Affairs Procedural Guidebook for guidance on proposing research centers/institutes (pp. 26-27).
- If the new center/institute is the result of a gift and a name is associated with its creation, the proposal must also follow the process outlined in BOR’s building naming policy.

Curriculum Proposal Form
The Curriculum Proposal Form is required for some Level I changes and most Level II changes. This form requires detailed information about the need for the program, plans for implementing the program, the program’s relationship to UM’s goals and other MUS institutions, etc.

- The “Implementation of the Program” card asks for projections of program headcounts and graduates. You should consult UMOnline, as they will provide data that will help justify your projections to BOR. BOR will follow up once the program is implemented to check on the accuracy of projections.
  - Review “Level II Academic Program Follow-Up” in the MUS Academic Affairs Procedural Guidebook for details (pp. 12-13).
- The “Revenues and Expenditures” card asks for detailed budget projections. If you are requesting new resources, they must first be approved by your Dean.
Fiscal Analysis Form and Required Courses Form
The Fiscal Analysis Form requires that you upload an Excel spreadsheet, the template for which is available on OCHE’s Academic Forms webpage. The Required Courses Form is an internal UM form that is intended to accompany the Fiscal Analysis Form.

- Before beginning work on the Fiscal Analysis Form, review Appendix C of the MUS Academic Affairs Procedural Guidebook for guidance (pp. 28-29).
- Before beginning work on the Required Courses Form, review the Required Courses Form Instructions.
- Contact Hillary Stowell, Director of Academic Budgets and Personnel (hillary.stowell@mso.umt.edu) with questions about the Fiscal Analysis and Required Courses forms.
- Once submitted, the Fiscal Analysis and Required Courses forms will be routed to the Vice President for Administration and Finance and the Director of Academic Budgets and Personnel for review and approval.

Request to Plan Form
The Request to Plan (RTP) Form is the first step for proposals that feature substantive additions to, alterations in, or termination of programs, structures, or administrative or academic entities. The RTP is required for most Level II changes.

- RTPs must receive BOR approval before the forms for a full proposal can be submitted.

Termination/Moratorium Form
The Termination/Moratorium Form is required for proposals to terminate a degree/program, or place a degree/program into moratorium.

- Review p. 6 of the MUS Academic Affairs Procedural Guidebook for guidance on terminations and moratoriums. Note that a program will automatically terminated if it is not withdrawn from moratorium within three years.

Coursedog Help
The Coursedog Help Desk is an excellent resource and is always available.

Hadley Jackson, Program Manager in the Office of the Provost, is the best on-campus contact for Coursedog questions as they relate to Level I and II curriculum proposals.
This is the end of the handbook. Contact hadley.jackson@mso.umt.edu with questions or suggestions. Check the Provost's Curriculum webpage for updates and deadlines.