Academic Portfolio Review

Updated March 15, 2024

The Academic Portfolio Review will include all active programs in the University of Montana Catalog. Academic Portfolio Review will address the following objectives over the next three years (details and framework subject to change):

- **2023–2024** – Identify workforce, undergraduate, and certificate programs needing modification, consolidation, or moratorium to realign our current portfolio with student demand. Compressed timeline: Initiate Spring 2024 and complete Fall 2024.

Programs are any sequence of courses that lead to a credential appearing on the final transcript. Meta-majors, intake-majors, and pre-professional majors, along with other advising tracks that are not transcribed at graduation, are not included but may be added in future cycles. Programs are organized by review groups and reviewed by common units of analysis:

- **Review Group – Missoula College:**
    - Certificates
    - Associate's degrees
    - Concentrations
- **Review Group – Mountain Campus Undergraduate**
    - Certificates
    - Bachelor's degrees
    - Concentrations
    - Minors
- **Review Group – Graduate/Professional**
    - Certificates
    - Master's Degrees
    - Doctorates
    - Concentrations

Annual **program demand (enrollment)** and **productivity (degrees awarded)** metrics are drawn from BOR Policy 303.3 Program Review and will be tracked in each cycle, although they may not be part of the analysis every year. Seven years of data is used to align with program review. Standard data definitions for the university are linked here.

- **Enrollment** – Every student enrolled in the program after the 15th instructional day for both fall and spring semesters is added together to produce a duplicated headcount. Students are counted in every degree for which they are enrolled in both semesters. Summer-only programs will use summer headcounts.[1]

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[1] Technical definition: All potential fields are included, sourced from the Banner table SORLFOS.

- **Degrees Awarded** – Every student who received an award in the program by the official reporting day during the summer, fall, and spring terms. Double majors and double awards are counted in the appropriate programs.[2]
- **Averages** – Each metric will include a **seven-year average** when these data are available. Metrics with less than seven years of data will be averaged accordingly.
- **Enrollment Trend** – Trending current duplicated student headcount presented as a decline or growth trend against the seven-year average.
  - UM Overall
  - Missoula College (excluding dual enrollment)
  - Mountain Campus Undergraduate
  - Mountain Campus Graduate/Professional
- **Percentage of Major** – Current enrollment in concentrations presented as a percentage of current duplicated student headcount in the associated major.
- **Enrollment by Student Undergraduate Level** – Disaggregated headcount by first year, sophomore, junior, senior based on credits earned. This will only be provided for programs identified for further review.

Programs that are new and have fewer than three years of enrollment data are excluded from analysis but will have current metrics provided. The enrollment, completion targets, and outcomes of these programs are already monitored by OCHE as part of the curriculum process. Programs that have been combined, retitled, or consolidated in the last seven years will have their data merged to reflect these changes.

QUANTITATIVE REVIEW (complete)

1. Sort Programs by **Review Groups.**
2. Sort each Review Group by **Units of Analysis.**
3. Sort all programs within each unit of analysis into descending quintiles by **Average Enrollment** and **Average Degrees Awarded**.
4. Determine **metric scores** for each by creating descending proportional scores based on the highest metric for unit of analysis.
5. Metric scores are weighted and added together to arrive at the **final score** for each unit of analysis.
6. **Sort programs** in each Unit of Analysis by descending final score.

The results of initial scoring are reviewed by the deans and shared with campus. An overview analysis is presented to the Faculty Senate regarding the initial lessons learned from the review.

QUALITATIVE REVIEW

Step One: Sorting (Complete)

Programs are identified for review based on metric, score, and trend thresholds:

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[2] Technical definition: All awards recorded in the OCHE Student Data Warehouse end of term snapshots, which are taken after the Registrar's Office has finished processing degrees at the close of a term.

- **Qualitative Review** – The threshold for initiating qualitative review is dependent on the unit of analysis using a combination of final scores, enrollment trends, and current enrollment.
- **Monitor for Improvement** – Programs identified for monitoring show healthy current enrollment but declining trends or low enrollment but growing trends.
- **Review for Duplication** – Programs that duplicate an existing degree or minor.
- **Review for Termination** – Certificates where there is no major and concentrations that have not seen significant enrollment or graduation will be reviewed for termination. No degree programs will be considered for termination without qualitative review.
- **Exceptions** – In order to keep the list of programs needing qualitative review manageable each year, exceptions may be made for entire review groups or units of analysis.

Step Two: Program Meetings (Current Step)

The Provost's Office will schedule initial meetings with academic units and impacted programs to gather feedback and context. Conversations with degree programs will be the highest priority as they are the most complex. At this step, opportunities for collaboration to strengthen, modify, or sunset programs are encouraged to negate the need for a formal qualitative review if all parties agree.

Step Three: Provost and Program Response

The Provost's Office will send a written response summarizing the meeting conversation, the current understanding of the state of the programs, and a proposal for modifications and consolidations. This will include relevant operational data about the Academic Unit(s) that houses the program under review. It will address coursework that contributes to general education, program interdependencies, and recommendations for scaling program-specific offerings to serve current students, meet the needs of future students, and fulfill our obligations to community partners and external stakeholders.

Programs will be asked to respond in writing to accept these recommendations, propose alternatives, or request that the proposed recommendations be moved forward for further review (this date is flexible, depending on the pace of meetings as they are completed over the course of the academic year). Those that accept the recommendations or propose acceptable alternatives will be recorded as final recommendations.

Programs scheduled for BOR Program Review in AY24–25 can choose to complete a self-study and external review and delay final recommendations until Spring of 2025.

Step Four: Administrative Review

Programs that request further consideration will be reviewed using the established rubric. All material provided by programs and deans are presented to the Academic Officers and Executive Leadership before using the Qualitative Review Rubric. Shared governance leadership is invited to review materials and participate or observe based on their preference.

The Provost and President will review the same materials and the results of the Administrative Review and make final recommendations. Per UFA and MCFA CBAs **7.100 FACULTY SENATE,**

"Matters of academic concern may be initiated by the Senate or by the President or his/her representative," including, "issues that pertain to the academic affairs of the University and matters of critical concern about the welfare and Administration of the University."

Final recommendations will include a rationale invoking **Faculty Senate Procedure 201.30, Criteria for Program Review**.

- Completion of the program should be reasonable and achievable within the prescribed time frame for the degree or certificate (e.g., 4 years @ 15 credits per semester). Compliance with institutional and Board of Regents policies for credit limits (minimum and maximum) overall and within degree requirements should be assured.

- The unit should be capable of delivering the proposed curriculum. While staffing and teaching assignments are the purview of the administration, the unit must demonstrate that all the necessary resources (human and otherwise) are available so the program can be delivered and completed in a reasonable manner and time frame.

Step Five: Faculty Senate Review

Modifications arrived at through mutually agreeable final recommendations in Step One will be initiated by the program through the curriculum process in Fall 2024.

Modifications that are recommended by the President and Provost will be submitted to the Faculty Senate by the Office of the Provost and reviewed through the curriculum process in Fall 2024. Impacted programs will have the opportunity to submit alternative solutions to the recommended actions within the scope of the above criteria for consideration.