

# Academic Portfolio Review: Framework

1/30/24 Draft

The purpose of this process is to establish an annual comprehensive review of the academic portfolio of the University of Montana using the metrics defined in BOR Policy 303.3 Program Review, as well as targeted performance indicators related to program health, sustainability, and student success. Academic Portfolio Review will align with the university's strategic objectives and those of the Academic Affairs Playbook. The objectives for the next three years will address the following:

- 2023–2024 – Identify programs needing modification, consolidation, or moratorium to realign our current portfolio with student demand. Compressed timeline: Initiate and complete in Spring 2024.
- 2024–2025 – Identify program curricular complexity impacting students' time and credits to degree and improve performance in our 6-year graduation rate (undergraduate and general education programs), gainful employment (workforce programs), Financial Value Transparency (workforce and graduate programs), and R-1 completion rate (PhD/doctoral programs). Target timeline: initiate Spring 2024 and complete Spring 2025.
- 2025–2026 – To be determined. The lessons learned from the first two years of review will inform subsequent years.

Programs demonstrating low demand and/or productivity based on the metrics under review will complete a qualitative review and potential modification or improvement planning. This review will be completed by the academic officers, key members of the executive leadership team, and shared governance using a common scoring rubric, contextual data provided centrally, and context provided by program leaders. Each year the Qualitative Scoring Rubric will be customized to the performance indicator being examined. The rubric will include enterprise risk management principles to identify financial, operational, or reputational impacts risks and opportunities associated with resulting recommendations.

This ongoing process, the data collected, and the actions taken, will then be integrated into seven-year Program Review and NWCCU Accreditation cycles. It will become part of our regular operating rhythm as a sector in which we are consistently assessing our productivity and refining our Academic Portfolio to provide the access to the learning and knowledge that our students rely upon for their future success.

## 2023–2024 Quantitative Review

The objectives of this initial phase of program review are:

- Close, consolidate, or merge struggling programs with diminished trending productivity and demand;
- Identify struggling programs with mission centrality to revitalize through monitored improvement plans; and

- If necessary, work with impacted faculty to identify teaching responsibilities and possible program affiliations.

The following quantitative metrics are drawn from BOR Policy 303.3 Program Review. Student demand and program productivity is measured by duplicated headcount and degree completers. Seven years of data is used to align with program review.

Programs, broadly defined for these purposes, are any sequence of courses that lead to a credential appearing on the final transcript and will include the following units of analysis:

- Degrees and Majors (Associates, Bachelors, Masters, Doctorates)
- Certificates (Technical, Baccalaureate, Graduate)
- Minors and Concentrations

Programs that are new and have or that have fewer than three years of enrollment data are excluded from analysis. Metrics with less than seven years of data will be averaged accordingly. The enrollment and 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.

Meta-majors, intake-majors, and pre-professional majors used for advising that do not lead to a degree will not be included in this round of review but may be included in future cycles.

Metrics:

[Standard data definitions for the university are linked here.](#) Metrics will be drawn from data ranging from AY 16-17 to AY 22-23.\*

**Scoring Metrics:**

- Average Enrollment** – seven-year average of duplicated student headcount. This includes every student enrolled in the program after the 15<sup>th</sup> instructional day for both fall and spring semesters added together. Students are counted in every degree for which they are enrolled **both semesters**. Summer-only programs will use summer headcounts. *Technical definition: All potential fields are included, sourced from the Banner table SORLFOS.*
- Average Degrees Awarded** – seven-year average of students completing the program. This includes every student who received an award in the program by the official reporting day during the summer, fall and spring terms (end of term snapshot in the OCHE Student Data Warehouse for fall, spring, and summer). Double majors and double awards are counted in the appropriate programs. *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.*
- Total and Average Enrollment and Degrees Awarded** – the total for each metric across all programs for the unit of analysis.
- Percentage of Total** – the program's percentage of enrollment and degrees awarded for the unit of analysis.

## Contextual Metrics:

- e) **Current Enrollment** – most recent **duplicated student headcount** for a full academic year.
- f) **Enrollment Trend** – trending current enrollment duplicated student headcount presented as a decline or growth trend against the average.
- g) **Percentage of Major** – Concentrations only, current enrollment in concentrations presented as a percentage of current duplicated student headcount in associated major.

\* Some units of analysis will have less than seven years of data. The average for those units will be based on the 3 to 6 years of data available.

## Quantitative Review Process:

1. Sort **Units of Analysis** into the following **Review Groups**: Graduate/Professional (Post-Baccalaureate Leading to Licensure); Undergraduate; Missoula College
2. Sort each **Review Group** by **Units of Analysis**
3. Sort each Unit of Analysis into descending quintiles by **metric d)** (percentage of total) for both enrollment and degrees awarded to determine **metric scores** from 5 (highest) to 1 (lowest). Quintiles scores should not split a tied score.
4. Add the metric scores to arrive at the **final score** for each unit of analysis.
5. Sort each **Unit of Analysis** by final score.

Once this scoring and sorting of each unit of analysis is complete, programs identified as having diminishing productivity and demand will be sorted for consideration. This initial sorting will be thoroughly reviewed by the deans and faculty of the impacted programs. They will be sorted by following *suggested* categories using metric, score, and trend thresholds.

- **Duplicative** – concentrations that duplicate an existing degree or minor regardless.
- **Termination** – Certificates, Concentrations, and Minors where there is no major that have not seen significant enrollment, graduation, or positive trends will be brought forward for termination. No degree programs (associates, bachelors, masters, etc) will be considered for termination without qualitative review.
- **Qualitative Review** – the threshold for initiating qualitative review will be dependent on the unit of analysis using a combination of **final scores, enrollment trends, and current enrollment**. Programs with a high final score showing declining enrollment trends of 50% or more will also be brought forward.
- **Monitor for Improvement** – programs with low final scores but healthy current enrollment and growing enrollment trends will be flagged for improvement and monitored for health and viability in the next cycle of Academic Portfolio Review.
- **Exceptions** – All **Education Programs** will be reviewed as a unique portfolio against revised state standards during subsequent portfolio reviews. **Certificates and Minors where there is a major** will be moved to **Monitor for Improvement**. **Doctoral Programs** and their associated masters will be scored but further analysis will not be required in this Academic Portfolio Review cycle as their continuation is vital to sustaining R-1 Status.

The results of this initial draft sorting will be shared with deans for further scrutiny before it is shared with campus.

### Qualitative Review Process:

The initial results of the Quantitative Review will be presented to the Executive Committee of the Faculty Senate, the Bargaining Units, and affected programs.

#### Step One: Contextual Data

The following contextual financial and operational data for the Academic Unit(s) of each program will be provided to reviewers and programs under review:

- Un-duplicated Student Headcount – 6 Years
- Student Credit Hours – 6 Years
- Student/Faculty Ratio – 6 Years
- Research Expenditures – 6 Years
- Budget Model Allocation versus Actual (AY 22-23, tentative)

#### Step Two: Level-Setting

The Office of the Provost will schedule initial meetings with academic units and impacted programs to gather feedback and context. Opportunities for collaboration to strengthen or modify programs may be brought forward.

The review group will meet to discuss the results of the Quantitative Review, contextual data, and the qualitative scoring rubric. Impacted deans will have a chance to present to any adverse operational and/or reputational considerations they foresee in writing.

#### Step Three: Scoring

Each member of the review group completes the scoring process for each program under review using the rubric in a secure Qualtrics survey.

#### Step Four: Analysis

The group reconvenes after reviewing the resulting quantitative and qualitative scores for each program to make final recommendations to the provost. The review group may identify opportunities to align or consolidate programs with related missions and/or disciplinary interdependencies to maximize performance potential. They may also identify programs with declining demand and low enrollment for moratorium.

#### Step Five: Final Recommendations

The Office of the Provost will meet with affected programs to discuss recommendations based on the findings of the completed Quantitative and Qualitative Analysis. Final recommendations are made by the Provost to the Senate in March.

### Step Six: Curriculum Changes

Implementation of the recommendations will take place through the Faculty Senate curriculum process by the April and May Senate Meetings. Level I and II program terminations, moratoria, and/or structural changes and are brought forward from the Office of the Provost in collaboration with the affected programs, units, and deans directly to ECOS for consideration at the April Faculty Senate meeting.

Any resulting program modifications are reviewed by ASCRC and Graduate Council for consideration at the April or May Faculty Senate meetings. If deemed appropriate, some program modifications may be delayed until the following fall.

Future iterations of Academic Portfolio Review will be timed to align with the established Fall and Spring Curriculum deadlines.

### Proposed Spring 2024 Timeline

*This timeline is currently under development. The full timeline will be finalized after feedback is received from campus.*

January 29	Drafts of the Academic Affairs Playbook and Academic Portfolio Review Framework, Qualitative Rubric are made available on the Provost's Website for feedback via an anonymous Qualtrics Survey.
February 5	<i>Tentative.</i> Academic Portfolio Review Data is made available to the campus community for feedback.
February 8	Academic Playbook and Portfolio Review status update at Faculty Senate.
February 9	ECOS listening session for all Faculty.