Academic Portfolio Review
Quantitative Analysis – Spring 2024

After careful evaluation of the data provided by Institutional Research, this initial Quantitative Analysis is presented for campus review. The data include seven years of **enrollment (program demand)** and **degrees awarded (productivity),** metrics aligned with Board of Regents Policy 303.3 Program Review. Student credit hours (SCH) are not analyzed in this cycle as they are not easily tracked at the program level, and they are not a reliable indicator of student success. They may be considered as an indicator of revenue generation by academic units during the Qualitative Review process.

How to Read the Spreadsheet

The Quantitative Analysis spreadsheet used to conduct this year's Academic Portfolio Review is divided into color-coded tabs:

- The **green tab** is the complete dataset. It is possible to filter and sort this tab by college, academic unit, degree, major, and concentration. It includes each year of **duplicated headcount** and **degrees conferred** from **AY16–17** to **AY22–23** and **average enrollment** for all programs on campus that lead to a transcript credential. AY23–24 is included to establish current trends in enrollment and degrees awarded.
- The **blue tabs** are the analysis sheets. **These tabs present program headcount as an average of fall and spring duplicated headcount** to better represent the actual number of students studying in a program. The scores for each tab are calculated as follows:
  - Sort all programs within each unit of analysis into descending quintiles by **Average Enrollment** and **Average Degrees Awarded**.
  - Determine **metric scores** for each by creating descending proportional scores based on the highest Average Enrollment (10) and highest Average Degree Awarded (10).
  - Metric scores are weighted **40% enrollment** and **60% degrees awarded** and added together to arrive at the **final score** for each program. Greater weight has been allocated to program completion to align this review with demonstrated evidence of student success.
  - Programs have been sorted in each Unit of Analysis (certificate, major, etc.) by descending final score.
- The gray tabs contain unscored metrics for graduate programs, which were not analyzed in this round of Academic Portfolio Review. The ongoing efforts to build out the Graduate Catalog and to put graduate programs into the DegreeWorks platform makes the effort premature. We will complete a review of graduate programs in a subsequent cycle.

Programs that are new or have fewer than three years of enrollment data are excluded from the analysis, but current metrics are provided. The enrollment, program completion targets of these programs are already monitored by Office of the Commissioner of Higher Education (OCHE) as part of the Montana University System curriculum process. Programs that have been combined, retitled, or consolidated in the last seven years have their data merged to reflect these changes.

Programs identified for review will be sorted into the following suggested categories using the metric, score, and trend thresholds described below.

- **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 showing declining enrollment trends below the baseline for the review group will also be brought forward. See definitions below.*
- **Monitor for Improvement** – Programs identified for Qualitative Review but showing healthy trending enrollment will be exempted from further review in this cycle and will be monitored for improvement in the next cycles of Academic Portfolio Review.
- **Review for Duplication** – Programs that duplicate an existing degree or minor.
- **Review for Termination** – Certificates and concentrations that have not seen significant enrollment or graduation will be reviewed for termination. No degree programs (associates, bachelors, masters, doctoral) will be considered for termination without qualitative review.
- **Exceptions** – All Education Programs will be reviewed as a unique portfolio against revised state licensure standards and an increasing educator shortage in subsequent portfolio reviews. Certificates and Minors where there is a major will be moved to Monitor for Improvement.

Definitions
The following definitions are explained as they apply to the Academic Portfolio Review process. Further definitions developed in 2021 are provided by Institutional Research here:

https://www.umt.edu/institutional-research/metrics/data_definitions.pdf

Averages for the duplicated headcount and degrees awarded were calculated based on the ""FINAL Approval Date"" listed in the Central Degree Inventory. If there was no date listed, then the average was calculated over the 7 years.

Duplicated Headcount includes every student enrolled in the program after the 15th instructional day for both fall and spring semesters. Students are counted in every degree for which they are enrolled both semesters. *All potential fields are included, sourced from the Banner table SORLFOS.*

Degrees Awarded 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.*

Enrollment by Student Undergraduate Level is the disaggregated headcount by first year, sophomore, junior, senior based on credits earned. This will only be provided for programs identified for further review.

Enrollment Trend is the current duplicated student headcount presented as a decline or growth trend against the average. Important baseline trends since Fall 2016 to consider:

- UM Overall: -21%

- Missoula College (excluding dual enrollment): -35%
- Mountain Campus Undergraduate: -26%
- Mountain Campus Graduate/Professional: +15%

Percentage of Major is the current enrollment in concentrations presented as a percentage of current duplicated student headcount in the associated major.

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 do not lead to a degree, are not included in this analysis but may be added in future cycles.

Review Group are all programs sorted by common attributes such as mission, student level, program length and type, and degree outcomes. The review groups for Academic Portfolio Review are Missoula College, Mountain Campus Undergraduate, Mountain Campus Graduate/Professional.

Units of Analysis are the common credentials being evaluated within a review group. Each unit of analysis has its own tab in the data. For example: bachelor's degrees, minors, master's degrees, certificates, etc.

Qualitative Review

Once, programs are identified for Qualitative Review, Deans, and the Provost will schedule initial meetings with academic units and impacted programs to gather feedback and context. The objectives of this phase of Academic Portfolio Review are to:

- Identify struggling programs with mission centrality to revitalize through monitored improvement plans;
- Close, consolidate, or merge struggling programs with diminished trending productivity and demand;
- If necessary, work with impacted faculty to identify teaching responsibilities and possible program affiliations; and
- Ensure the 2024–2025 Catalog reflects the changes recommended by the process through the Faculty Senate and BOR curriculum processes by the end of the academic year.

With that in mind, the orienting questions for the Qualitative Review process are:

- What are the risks and opportunities associated with this academic program under review?
- Does the program need to be modified, consolidated with another program, or put into moratorium?

Colleges may reference contextual financial and operational information for programs under review.

Opportunities for collaboration to strengthen, modify, or sunset programs may be brought forward that negate the need for a formal Qualitative Review if all parties agree.

Once these initial meetings have taken place, the final Qualitative Review by Academic Officers, and members of executive leadership, with participation and guidance from shared governance

leadership will address the following questions by applying the rubric linked below. Please note, academic units are not expected to provide answers to all the questions above. These are provided for context to guide discussions prior to Qualitative Review.

- Is the current instructional staffing sufficient to cover the curricular breadth and depth of the program as currently configured?
- Are administrative staff and operating expenses sufficiently covered by stable general, designated, and foundation funds?
- Do the program outcomes meet the needs of external stakeholders and prospective students, given the demographic changes forecasted the next decade?
- How does the program impact student outcomes, curriculum, and/or operational functions of other programs on campus?
- Is the program aligned with UM's current Mission and Vision and the goals and responsibilities articulated in the Academic Affairs Playbook?
- What are the reputational risks to modifying, consolidating, or placing the program in moratorium based on past performance and future sustainability?
- Are the proposed actions compliant with current bargaining agreements and established labor relationships?
- How will workforce development and community partnerships be impacted? (Missoula College) or, how will the productivity of Research and Creative Scholarship of the program be affected (Mountain Campus)?
- Are financial savings significant enough to offset any loss of revenue or temporary reputational impacts?

Review Thresholds

Unit of Analysis	Review for Termination	Qualitative Review	Monitor for Improvement
All Education Credentials			Review based on current licensure needs
Certificates - MC, UG, & Grad	Final Score = 0	Final Score ≥ 0.6	There is related program
			or AY 22-23 Grad ≥ 3
		or Trend < -21%	*or* AY 23-24 Enroll ≥ 3
MC - Associates & Concentrations		Final Score ≤ 0.4	Trend ≥ -35%
		or Trend < -35%	*or* AY 23-24 ≥ 10
UG-Minor		Final Score ≤ 1	There is a major
		or Trend < -26%	*or* AY 23-24 Enroll ≥ 10
UG-Concentrations	Final Score = 0	Final Score ≤ 0.35	Trend ≥ -26%
		or Trend < -26%	*or* AY 23-24 Enroll ≥ 10
UG-Bachelors		Final Score ≤ .75	AY 23-24 Enroll ≥ 50
			or Trend ≥ -26%
		or Trend < -26%	*and* AY 23-24 Enroll ≥ 20