

DRAFT ACADEMIC PORTFOLIO REVIEW & TIMELINE

This Academic Portfolio Review draft was informed by the Faculty-Staff Senate Open Space recommendations to engage in program review and developed by academic deans and the provost. A successful portfolio review of UNCG's academic offerings will help us: 1) identify changes we should make to our academic programming that builds upon academic distinction and strengths, 2) achieve financial sustainability, 3) meet student and labor market demand, and 4) continue to provide accessibility for students. Portfolio review should occur regularly and align with our academic mission and values, The process outlined here may be modified to be more sustainable after the first year.

Personnel, financial, and course data are at the department/school level and student data are at the program level. Each department/school will have program level detail about demand, enrollment, and student success. Department chairs/school directors, faculty, and deans will need to provide important context and understanding to determine how the multiple programs in a department/school impact teaching and research activity, faculty time, and costs and revenues.

Step 1 (Spring 2023): Establish Portfolio Review Task Force (no greater than 10 representatives)

Portfolio Review Task Force (PRTF) Composition -

The PRTF would be composed of a representative cohort of College/School faculty and staff. A reasonable size task force of approximately 10 individuals avoids a difficult and unwieldy process. Some individuals may represent two or more of the roles listed below.

Suggestions for the composition of the University Portfolio Review Task Force (PRTF)

- A mix of professional-track and tenured/tenure-track faculty
- Academic Staff (SHRA and EHRA)
- Representation of 7 schools/colleges (who might represent several of the other conditions specified)
- Faculty Senate Chair or an elected representative from the Faculty Senate
- Representative elected from Graduate Council
- A resource person who can understand the complexities of the data (e.g., Assistant Dean for Finance or Dean of Undergraduate Studies)
- Representative from Institutional Research and Enterprise Data Management
- Representative from the Research Advisory Council

We suggest that the following not be on the committee:

- Deans
- Students

Task force responsibilities:

- Recommend and assess metrics and data sources
- Determine what qualitative data should be included and length of materials

- Develop a rubric for program review including weighting of the various data categories
- Host open forums to provide faculty engagement and opportunities for input

Step 2 (Spring and Summer 2023): Identify What Data Can be Accessed and Used in Portfolio Review

The driving purpose of a portfolio review process is to assess the health of each academic program with a range of possibilities including discontinuation, maintenance and those that are positioned for future expanded vibrancy with additional investment (categories will be identified by the PRTF). An important component to such assessment is the availability of data informing program health and productivity as well as the costs of operating each program. Because program health and productivity can be multi-faceted, its assessment involves a wide range of specific metrics and data sources pertaining to a myriad of factors associated with program outputs.

A key attribute of the data used in the program review process is accessibility across the UNCG community to ensure transparency. Where possible, accessible dashboards will be created to foster the open sharing of information used within the program review process. For transparency, these dashboards should be made available to all faculty and staff. These data and associated dashboards will be integral to the program review process.

Specific data to be considered will be as follows:

1. Cost and Revenue of Delivery (Estimated based on the factors below; all course, personnel, and finance data are tracked in institutional data systems at the department/school level—efforts to capture faculty effort and related costs and revenues at the program level would have to be done manually)
 - a. Full-time faculty, part-time faculty, and staff full-time equivalencies (FTE) and headcount by department/school
 - b. Personnel spending by full-time faculty, part-time, faculty, staff, and graduate teaching/research assistants at the department/school level
 - c. Non-personnel spending for the department
 - d. Revenue for the department (tuition, differential tuition, fees, state appropriation)
 - e. Credit hour production by full-time and part-time faculty at the department level
 - f. Cost per credit hour by department
 - g. OTP (i.e., operating budgets)
2. Academic Program Demand & Instructional Productivity/Efficiency (all student-related data can be captured at the program level)
 - a. Demand and yield—applications, admits, enrolls
 - b. Headcount enrollment for majors in the program (categories with respect to magnitude can be created)
 - c. Trend in headcount enrollment growth (categories with respect to trend can be created)
 - d. Number of degrees awarded over a five-year time period
 - i. Degrees produced
 - ii. Excess credits to degree

3. Support from Sponsored Program Activity (all of this will be at the department/school level because all financial and personnel data systems are organized at the department/school, not program level)
 - a. Total annual grant and contract expenditures
 - b. Salary savings from grants and contracts
 - c. Indirect cost recovery from grants and contracts
 - d. Total of salary savings and indirect cost recovery
4. Student Success
 - a. One-year retention rate
 - b. Four-year graduation rate (same metric for first-time students and transfer students)
 - c. Six-year graduation rate for first-time students
 - i. Disaggregate by race/ethnicity and Pell eligibility
 - ii. Markers for Gen. Ed. or other required course pathways
5. Labor Market & Regional/State Workforce Reliance
 - a. Each program is classified with respect to
 - i. job growth, and
 - ii. job openings
 - b. State workforce reliance on program graduates (i.e., is the state heavily reliant on graduates of the program?)
6. Research, Scholarship, and Creative Activity Productivity (available standard metrics e.g., external funding, annual reviews documentation)
7. Qualitative Data (e.g. prestige and peer comparison data, EDI outcomes, community engagement and impact, etc.)

Step 3: (Mid Aug-September 2023): Feedback and refinement of rubric.

Once the PRTF develops a rubric that includes the weighting of all metrics, it will be shared with the College/School units for feedback. Following feedback, the PRTF will refine and recommend a final rubric used to guide the program review processes. Upon final approval by the Provost and Academic Council, the rubric will be used by the Colleges/Schools for program review.

Step 4 (Late September-December 15, 2023): Provide Deans the metric and weighting; School/Colleges will review each program data and use metric/weighting to make recommendations (this could range from discontinuation to suggested investments) to the Provost.

The implementation of the portfolio review process will consist of the following phases:

1. Phase 1 of Implementation. Using the data, metrics, decision rules, and processes established by the PRTF, as outlined in Step 3 above, each Dean will use some process (an existing committee or the Ad Hoc Committee mentioned below) to review data for each department's/school's programs and make assessments of where programs fall within the rubric classifications. The program-level classifications will be shared with the academic units.

2. Phase 2 of Implementation. Programs identified as being candidates for discontinuation during Phase 1 of implementation will be engaged in an additional unit-level review, which will allow the surfacing of additional information, including more qualitative information pertaining to program health and viability. This Phase 2 aligns with the suggestions from the joint Faculty and Staff Senators Open Space Technology group. To support Phase 2, each college or school should establish an Ad Hoc Committee as suggested by the Open Space group. However, we recommend that an Associate Dean serve on each committee rather than the Dean. The Ad Hoc Committee will review and provide feedback to the unit Dean. This feedback will also be made available to other faculty, staff, and the Provost. It is important that all faculty appointed to these committees have a pan-UNCG mindset and avoid territorial thinking. The following five constituencies, among others, should be represented on these committees:
 - a. At least two tenured/tenure-track faculty members.
 - b. At least one professional-track faculty member
 - c. The college/school Assistant Dean for Finance and resource planning (or similarly titled administrator)
 - d. At least one staff person other than the finance person mentioned above
 - e. An Associate Dean of the college or school
3. Phase 3 of Implementation. Based on the outcomes of Phase 1 and Phase 2 of implementation, the Dean will make a unit-level recommendation on program continuation/discontinuation, which will be brought to the Provost and/or Academic Council for final recommendations. The Provost will work with the Chancellor on the final decisions. The Chancellor and Provost will communicate the final decisions to the University community.
4. Phase 4 of Implementation. Based on decisions made in Phase 3, relevant steps and appropriate policies would be followed to sunset individual programs (communications to impacted faculty, students, staff, teach out plans, etc.) and/or to identify how to increase or reallocate resources for program investments.

An annual process would be established such that Phases 1–4 are carried out on a regularly scheduled basis and may be modified to ensure sustainability.

Step 5 (January 2024) Communicate decisions to campus; campus stakeholder open forum and feedback opportunities; final decision to Chancellor by end of January.

Step 6. (Spring 2024) PRTF Evaluates Processes for Future Modification

In the spirit of continuous improvement, and based on information collected during the implementation phases, the PRTF will work to propose recommendations to future implementation of the program review process.

Addressing Stakeholder Input

Faculty and Staff can contribute by the following:

- Representation on the PRTF
- Providing input to the data sources via open forums
- Providing feedback to PRTF recommendations via their unit level committees

Graduate School/Student Success can contribute by the following:

- “Resource” Representative serves on the PRTF
- Providing feedback to open forum discussions for data considerations
- Providing feedback to the unit level committees

DRAFT TIMELINE

Description	Start Date	Due Date	Responsibility	Notes:
Proposal draft submitted from Dean Workgroup to Provost (due 2/14)	1/19/2023	2/24/2023	Deans Working Group	Revised and circulated to deans on 2/28 for discussion on 2/29
Proposal discussed within Academic Council		3/1/2023	Deans Working Group	
Proposal/Process refined	3/1/2023	3/10/2023	Deans Working Group/Provost	
Process and timeline shared with other units on campus; feedback sought	3/13/2023	3/23/2023	Provost/faculty/deans	Provost will send directly to all faculty and faculty senate, inviting written feedback from faculty to deans; post on Academic Data Dashboard webpage
Virtual open forums hosted for discussion and feedback purposes	3/16 4-5 pm 3/20 4-5 pm		Provost and Deans/Campus community	

Feedback considered and incorporated; process document revised and shared	3/24/2023	3/30/2023	Provost/Deans	Provost will send revised process document directly to all faculty, post revised process document on Academic Data Dashboard webpage, and inform campus of posting
Members of the PRTF invited to serve	3/24/2023	3/31/2023	Provost Office/ Academic Deans/Faculty Senate	Open call
PRTF membership confirmed; membership communicated to University	4/3/2023	4/7/2023	Provost	
PRTF receives "Charge" and meets with rpk to discuss available data; discusses other relevant tasks (e.g. weighting, rubric)	4/10/2023	4/21/2023	PRTF, rpk	
PRTF hosts a campus wide session on available data; invites recommendations and discussions about other data considerations (weighting, rubric)	4/24/2023	4/28/2023	PRTF/Campus community	
PRTF develops rubric that includes weighting of data and metrics that will be included in portfolio review	5/1/2023-	7/21/2023	PRTF	PRTF's work continues over the summer; faculty not on contract will receive summer stipend

PRTF shares rubric and metrics for feedback with Academic Dean Council; revises based on feedback	7/24/2023	8/7/2023	PRTF/Academic Council of Deans	An Academic Council member will be appointed to facilitate the review, collect feedback, and transmit it to PRTF
PRTF hosts a campuswide session to a share rubric and metrics for feedback; PRTF seeks written feedback from units and campus	8/21/2023	9/1/2023	PRTF/Campus community	
PRTF refines and clarifies rubric and metrics based on campus feedback	9/1/2023	9/15/2023	PRTF	
PRTF publicizes program rubric and metrics for campus	9/18/2023		PRTF	
Deans and their teams (as determined by each college/school) will review each program using metrics and data and make recommendations; includes phase 2 where programs recommended by deans for discontinuation engage in an additional unit-level review using ad hoc unit level committee	9/18/2023	12/15/2023	Deans, possibly unit-level review committees	
Deans make final recommendations on program discontinuation to the Provost	1/8/2024	1/15/2024	Deans	
Recommended programs for discontinuation	1/15/2024	1/26/2024	Provost and Deans	

shared publicly; Provost hosts campus stakeholder open forum for feedback; final decisions to Chancellor by end of January				
Final recommendations to Chancellor	January 31, 2024		Provost	
Begin Implementation: no longer accept students to programs slated for discontinuation; follow policy and process for discontinuation, including communication plan and teachout plans for students; for programs that need investments for growth, discussions and planning for how to support such investments will occur.	Begin February 2024	Through spring 2024	Provost, Deans, Enrollment Management, etc.	