UNCG ACADEMIC PORTFOLIO REVIEW & TIMELINE
Office of the Provost
April 6, 2023
(Timeline updated on 4/2023)

This document is intended to provide information for the entire University community about the recently launched UNCG Academic Portfolio Review initiative. As indicated below, dozens of key individuals representing numerous faculty and staff committees and leadership groups have been engaged in this broadly participative effort.

A portfolio review of UNCG's academic offerings will help us identify areas where we can 1) strengthen academic programming to build upon academic distinction and strengths; 2) achieve financial sustainability; 3) better align academic portfolio with student demand and workforce needs; and 4) enhance accessibility for and academic success of students. At universities across the country, portfolio review occurs on a regular basis, helping these institutions to align programming with their academic missions and values. Portfolio review also helps to establish an annual process for academic program review, though the process may be adapted for effective continuous improvement after the first year.

The primary steps in the Academic Portfolio Review at UNCG, which began in late Fall 2022 and will continue to unfold through Spring 2024, are described below.

—--

Step 1 (December 2022 - April 2023): Establish the Portfolio Review Process: This Academic Portfolio Review process was informed by a wide range of campus stakeholder feedback, including the following:

- The December 5, 2022 Faculty-Staff Senate Open Space session resulted in recommendations for how to engage in program review, including an initial draft.
- That draft was refined and further developed by academic deans and the Provost, including the addition of a timeline. Following review and comment by the Faculty Senate Executive Committee, the draft was distributed to all faculty (and posted online) on March 13, 2023 with a request for comments and suggestions.
- Two widely advertised open forums on March 16 and March 20 were hosted by the Provost and deans, permitting additional opportunities for engagement and feedback.
- The document was subsequently refined based on comments received directly from faculty and staff, comments from faculty and staff that were passed along from deans, and all comments/suggestions offered during the open forums. The revision was forwarded to deans for review on March 21, with comments due to the Provost by March 27, 2023.
- On April 3, 2023, the Faculty and Staff leadership teams were provided another opportunity to review and revise the draft process and timeline documents. Comments were forwarded to the Provost on April 4-5, which led to the final revision of this document.

Step 2 (April 2023): Appoint the Portfolio Review Task Force
Portfolio Review Task Force (PRTF) Composition:
The PRTF will be composed of a representative cohort of College/School faculty and staff. A reasonably sized task force, anticipated to include approximately 10-15 individuals, will be assembled to help achieve representation from 7 schools/colleges while keeping the size of the Task Force manageable. Some individuals may represent two or more of the roles listed below.

The University Portfolio Review Task Force (PRTF) will be composed of the following (call for nominees was distributed March 28; nominations were due April 4; invitations to serve on the PTRF were distributed on April 5; task force membership will be confirmed and publicized on April 12, 2023.

- A mix of professional-track and tenured/tenure-track faculty
- Academic Staff (SHRA and EHRA)
- Representation of the seven schools/colleges
- Outgoing Faculty Senate Chair
- Representative elected from Graduate Council
- A resource person who can understand the complexities of the data (e.g., Assistant/Associate Dean for Finance or Associate Dean)
- Representative from Institutional Research and Enterprise Data Management
- Representative from the Research Advisory Council

The Portfolio Review Task Force will NOT **be responsible for making program decisions. Their charge is to:**

- Leave their discipline and unit mindsets "at the door" and adopt a University mindset.
- Review and assess metrics and data sources with insights from the data team that has been established;
- Determine what qualitative data should be assessed, including the quantity of materials;
- Develop a rubric for program review, including (a) consideration of potential weighting of the various data categories, and (b) the identification of any differences in the evaluation criteria used and/or weighting applied between undergraduate and graduate programs; and
- Host open forums to provide faculty and staff engagement and opportunities for input.

Step 3 (April through August 2023): Identify What Relevant Data Can be Centrally Accessed and Develop a Rubric for Program Evaluation

The driving purpose of a portfolio review process is to assess each program effectively in a manner that helps inform decisions for adapting our academic portfolio in the context of the financial and workforce conditions we face and the mission of UNCG. Each academic program will be assessed, and a range of possibilities will be considered, including discontinuation, reduction, maintenance, and investment for those programs positioned for future expansion. An important component of such

assessment is the availability of data reflecting program strength, productivity, operating costs, and other factors deemed relevant.

Personnel, finance, and course data in the dashboards will be presented at the department/school level with student data reported at the program level. Each department/school will have program-level detail about course and seat demand, course and program enrollment, and student academic performance. Department chairs/school directors, faculty, and deans will provide necessary context and understanding to determine how the multiple programs in a department/school impact teaching and research activity, faculty time, and costs and revenues.

The data used in the program review process will be accessible across the UNCG community to ensure transparency. Accessible dashboards will be created and shared with faculty and staff to foster the open sharing of information used in the program review process. Some data will be provided and posted by central units (e.g., Graduate School and the Office of Research and Engagement). Individual programs will not be asked to provide their own quantitative data, though they will be asked to provide qualitative data and context.

Specific data to be considered will include, but are not limited to:
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. Faculty FTE (total full-time and part-time faculty FTE) and faculty headcount by department/school
    b. SHRA and EHRA Non-faculty Staff FTE (total full-time and part-time staff FTE) and staff headcount by department/school
    c. Personnel spending for all faculty, staff, and graduate teaching/research assistants at the department/school level
    d. Non-personnel spending for the department/school
    e. Revenue for the department (tuition, differential tuition, fees, state appropriation)
    f. Credit hour production by full-time and part-time faculty at the department/school level
    g. Cost per credit hour by department/school

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 three-year time period, AY 2020-21, AY2021-22, and AY2022-23.

3. External Grants and Contracts Activity (these data will be provided by the Office of Research and Engagement and the Office of Contracts & Grants Accounting; 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; data will not be in a dashboard but will be posted on the website for transparency)
    a. Total annual grant and contract submissions and awards
    b. Total annual grant and contract expenditures
    c. Salary savings from grants and contracts
    d. Indirect cost recovery from grants and contracts
    e. Grant related graduate support and undergraduate support (GRA/GTA & waivers)

4. Student Success for Undergraduate Programs
    a. First-year course completion rate for cohort students by course department (not by student major program/department; data on this metric is currently available on existing UNCG dashboards)
    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
    d. Degree efficiency, measured as total number of hours completed upon graduation, as well as the difference between number of hours attempted vs. completed by graduates (this metric is currently available on existing UNCG dashboards)

5. Student Success for Graduate Programs (these data will be provided by the Graduate School and will not be in the form of a dashboard; these data will be posted on the website for transparency)
    a. Time extensions granted as a percentage of program enrollment (5 years for master's degrees and 7 years for doctoral degrees)
    b. Dismissals and Probation as percentages of program enrollments
    c. Number of sections of extension credits (These are artificial courses that students take when they've exhausted all the courses and hours required for their degree, but have not completed their work on the thesis (801), dissertation (802), or research capstone (803). They are a graduate-level analog of excess credits taken for an undergraduate degree and provide a measure of how closely the curriculum aligns with the actual coursework and progress of the students.)

6. Labor Market & Regional/State Workforce Reliance. Workforce data will not be in the dashboards because they will be pulled from external data sites, rather than institutional data sources. However, the rpk GROUP contractors will provide analyses of both labor market and competitors in regard to program offerings and alignment in a printed report that will be posted on the website. (For purposes of the ongoing portfolio review in subsequent years, UNCG will develop an internal process for acquiring labor market/workforce data.) Each program is classified with respect to
    a. job growth
    b. job openings

7. Qualitative Data (e.g., prestige and peer comparison data, EDI outcomes, scholarly activity not captured in #3, community engagement/partners and impact, facilities, etc.). The scope of required qualitative data will be determined by the PRTF and qualitative data will be posted on the website.

Step 4: (Mid-August through September 2023): Feedback and refinement of rubric.

Once the PRTF develops a rubric, 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 5 (Late September through mid-December 2023): Establishment of metrics and weighting for school/college review of each program's data and recommendations to the Provost.

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

1. <u>Phase 1 of Implementation</u>. Using the data, metrics, decision rules, and processes established by the PRTF, each dean will adopt a process (use 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. <u>Phase 2 of Implementation</u>. Programs identified as being candidates for discontinuation during Phase 1 of implementation will be engaged in an additional unit-level review, which could include the surfacing of additional information, including more qualitative and contextual information deemed important to understanding the program's health and viability. This second phase 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 or use an existing college/school level committee. The relevant associate dean is encouraged to serve on this committee. The Ad Hoc Committee will review and provide feedback to the dean regarding whether existing recommendations should be modified in any way. 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. If an Ad Hoc Committee is developed, it should minimally be comprised of the following:

   a. At least two tenured/tenure-track faculty members of different ranks
   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/school

3. <u>Phase 3 of Implementation</u>. Based on the outcomes of Phase 1 and Phase 2 above, 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 present recommendations to the Chancellor, who will make the final decisions. The Chancellor and Provost will communicate the final decisions to the University community.

4. <u>Phase 4 of Implementation</u>. Based on decisions made in Phase 3, relevant steps and appropriate policies would be followed to sunset individual programs (communications to impacted faculty, students, and staff; development of teach out plans, etc.) and/or to identify how to increase or reallocate resources for program investments.

Recognizing the need for reassessment of the academic portfolio in subsequent years, a process would be established to ensure that Phases 1–4 (with possible modifications to safeguard sustainability) are carried out on a regularly scheduled basis, as determined by campus stakeholders. In the spirit of continuous improvement and based on information collected during the implementation phases, the PRTF will work to propose recommendations for future implementation of the program review process.

Step 6 (January 2024: Campus stakeholder open forums scheduled for the purpose of explaining decisions and next steps.

Step 7 (Spring 2024): PRTF Evaluates Processes for Future Modification

TIMELINE

Note: This timeline was adjusted on April 20, 2023 to include a two-week time period for campus discussion regarding unit level recommendations.

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 and staff senates, 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	4/6/2023	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
PRTF call for nominations	3/28/2023	4/4/2023	Provost Office/ Academic Deans/Faculty Senate	Open call to campus
PRTF membership confirmed; membership communicated to University		4/12/2023	Provost	
PRTF receives "Charge" and meets with rpk to discuss available data; discusses other relevant tasks (e.g. weighting, rubric)	4/13/2023	4/20/2023	PRTF, provost with invitation to meet with rpk	
PRTF hosts two campus wide session to invite any recommendations and discussions about rubric, potential weighting, and qualitative considerations	5/2/2023, 2:00-4:00 pm Virtual via Zoom https://uncg.zoom.us/j/99108888601?pwd=aU5EWSt4WkNCQktRWDVDK2dIbjAvZz09	5/3/2023 10 am – 12 pm In person NIB 120	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	7/24/2023	8/7/2023	PRTF/Academic Council of Deans	An Academic Council member

Academic Dean Council; revises based on feedback				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	1/14/2024	Deans and Provost	
Recommended programs for discontinuation shared publicly; Open	1/15/2024	1/26/2024	Faculty, Staff, Deans, and Provost	

forums to discuss recommendations.				
Provost presents recommendations to the Chancellor who makes final decisions; Decisions communicated to campus	1/29/2024	2/1/2024	Provost & Chancellor	
Begin Implementation: no longer accept students to programs slated for discontinuation; follow policy and process for discontinuation, including communication plan and teach-out 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.	