Task Force: **Academic Portfolio**

Committee Name: **Subcommittee F-Graduate Programs**
Committee Chair(s): **Linda Black & Eugene Sheehan**
Committee Members and Titles**: Elizabeth Domangue, Harmony Newman, Greg Dekrey, Don Gudmundson, Audrey Snyder, Matt Birnbaum, Jill Bezyak (faculty), Jennifer Mayer, and Hannah Swick (staff and graduate student)** Date: **December 3, 2018**

Summary of Recommendations
1. Review of the graduate program portfolio should be a collaborative and transparent process involving faculty, students, staff, and administrators
2. Review of the portfolio should center on improving the quality of graduate education, reducing redundancies, retiring chronically low enrolled programs, identifying sustainable cost savings, identifying opportunities for interdisciplinary/shared programs, and aligning graduate offerings with the mission and values of the institution
3. Metrics, including quantitative and qualitative measures, and contextual variables should be considered
4. The review is systematic and timely
5. Relationships between Extended Campus, the Graduate School, and academic programs should be clearly defined and agreed to.
6. Discussions with programs identified for further review should occur prior to public announcements
7. Creation of a 'teach out' or transfer and communication plan for units identified for closure.
8. Establish a working group of graduate faculty, college deans, graduate students, staff and administrators early in the spring 19 term to finalize evaluation metrics, the process, with final recommendations due to the President and Provost by the close of the fall 2019 term.
9. Once the graduate portfolio review process is completed, revamp the program review process to include more timely review of graduate offerings consistent with the previously identified metrics, establish and enforce accountability measures and timelines with the central goal of continuous improvement

The Graduate Program subcommittee charge contained three (3) elements:

**a) What criteria shall we use to phase out unproductive programs?**
    The subcommittee reviewed and discussed a number of metrics provided by the graduate dean, drawn from the professional literature (Education Advisory Board [EAB], the Council of Graduate Schools [CGS], Eduventures, and the National Association of Graduate Admissions Professionals. Table 1 presents the initial list of metrics provided to the subcommittee and shared with the UG and Extended Campus subcommittees.

**Table 1**

| Initial Graduate Program Review Metrics | | |
|---|---|---|
| Data | Available from | Comments |
| 3 yr. funnel by program and site-applicants, admits, enrolled | IRAS | |
| Graduation rate by program, level and site | IRAS | |
| Time to degree by program and level | IRAS | |
| Persistence by cohort (# left or program closure) | IRAS | |
| Demonstrated demand from market data | GSchool | |
| FTE | IRAS | |
| Degrees/Programs: master's, specialist, doctoral, certificate | GSchool or prg. | |
| UG Teaching/Research Responsibilities | Program | |
| Program delivery mode(s) | GSchool | |
| Personnel:  FTE Tenured or tenure-eligible faculty, affiliate, clinical, adjunct faculty; administrative and support staff | Program/HR | |
| TA GA Allotments | GSchool/Research | |
| Student/Faculty Ratio | IRAS | |
| Program type: academic, professional, lab or studio based | Program | |
| Faculty Grant Activity | Research | |
| Accreditation requirements | Program | |
| Administrative reassignment of faculty within the unit Annual number of graduates | Program/HR | |
| Doctoral dissertation, capstone, and or thesis load per faculty | GSchool | |
| Individual course caps-clinical courses versus academic | Program/College | |
| Minimum class size per level | Program/College | |
| Degrees conferred | IRAS | |
| Student credit hours | IRAS | |
| Cost per credit hour/cost per student | IRAS/HR | |
| Contextual and qualitative | Program/College | |
| Alignment with University mission and values, including first generation and diversity | | |

The subcommittee used the majority of the time together to review and discuss the above referenced metrics. As a group, they arrived at the following qualitative and quantitative metrics (see Table 2).  The subcommittee discussed whether the metrics should be weighted or prioritized. Due to time constraints, the subcommittee suggested a working group (recommended later) as a next step to determine the desirability of weighting or prioritizing metrics.  While the subcommittee recognized the importance of a common set of metrics for all programs, they urge the involvement of program faculty and decision makers to consider both unique and common variables program by program.

**Table 2**

| Metrics agreed upon by subcommittee on 10/29/18 | | |
|---|---|---|
| **Quantitative** | **Measured by** | **Comments** |
| Program enrollment by # faculty involved in the graduate program, the # of offerings by program faculty of related programs in the UG, G and Ex Campus settings and the # of majors at UG level in the School or department | IRAS | Metrics viewed in context of Sch. or Depart. |
| SCH production average; with consideration of contextual variables | IRAS | # of UG majors |
| Completers by program @ UNC and regionally | Mkt. data | |
| Demand for the degree-opportunities for growth | Mkt. data | |
| Delivery mode-of the program | | |
| Scholarship and Assistantship (internal institutional funding) | Allotments | |
| Research $$ -personnel; other research external and foundation | Research Productivity | |
| Research active faculty-and output | RCSW-degree works | |
| Differentiated workload | Deans | |
| **Qualitative** | | |
| Congruence with institutional mission-research or professional | Work grp. | |
| History or legacy of program at UNC | Work grp. | |
| Quality of the program as measured by….Graduate School Exit Survey Report | TBD | Use standards developed by Graduate Council for program review |

b) **What criteria should we use for adding new programs?**
The subcommittee did not explicitly discuss this element because there was another subcommittee tasked with this matter. Given the nature of discussion within the group, generally, this subcommittee recommends the addition of any new program, certificate, endorsement or licensure at the graduate level be considered in light of:
- available resources, including start-up (new faculty, facilities, technology and space)
- market demand
- congruence with institutional mission and values
- innovation
- documented opportunities for public private partnerships and
- a clear potential to bring additional excellence and distinction to the University in general and specifically to graduate education
- possibility for external funding

c) **How can we revise current processes to achieve more effectiveness and efficiency?**
Graduate faculty workloads are inconsistent across the institution. The differentiated work load policy appears inconsistently utilized as does the research active faculty designation. Improved effectiveness and

efficiencies might be possible after a thorough review of these policies and practices with an eye towards clearly defined expectations and accountability.

Detailed Discussion of Recommendations

Subcommittee recommendations call for a transparent collaborative process involving students, faculty, staff, and administrators.  The metrics identified for graduate portfolio review are designed to reduce redundancies, demonstrate meaningful cost savings, streamline the graduate curriculum, promote interdisciplinarity, properly support programs of quality and distinction, and address faculty workload.

Effect on institutional resources

A thorough review and updating of the graduate program portfolio may result in cost savings, a more efficient utilization of available institutional resources (human, fiscal, technological, and infrastructure) and offerings that are sustainable and in demand.  Projected savings from retiring, revising or combining programs are anticipated from reductions in graduate instruction, advising and program coordination (i.e., faculty, coordinators, adjuncts and TAs salaries, benefits, PSAs and course releases), accreditation costs, research and travel dollars, technology (hardware and software) and infrastructure (library holdings and office and classroom spaces) supporting these endeavors.

Any review process must consider the interconnections, interdependence, and systemic nature of graduate programs (such as TAs in UG labs/field experiences and introductory courses, shared curriculum-graduate courses that serve other programs and offerings on main and extended campuses).  For example, decision makers will want to examine and determine the role/purpose/focus of Extended Campus programs as approximately 60% of current graduate offerings reside there.

Cost savings and efficiencies garnered from streamlining the graduate portfolio could allow for future investment in new programs, certificates, or professional development offerings.  The Graduate Subcommittee looked to the work of the subcommittee on new program development for guidance.

The cost of implementation would include and are not limited to the effect on faculty, student, and staff morale in programs designated for restructuring or retirement. Additionally, a communication plan to address internal and external perceptions of this process are crucial to its success as well as the general reputation of the University and, in particular graduate education at UNC.  Advising and a plan to 'teach out' identified programs must be conducted in concert with faculty and student input.  Additionally, time and resources from IRAS and HR are needed to provide data in the manner and format requested as well as the time and investment of faculty and administrators who comprise the recommended work-group.  Finally, a timeline must be established for the process of retiring and revitalizing existing programs and the creation of new 'in demand' graduate offerings.

Implementation of the recommendations

The recommendations provide for a collaborative transparent review process of existing programs and creation of new graduate offerings.  Revising and streamlining graduate offerings could reduce curricular redundancies, eliminate chronically low enrolled programs and certificates, address faculty workload issues, validate shared governance, demonstrate sustainable cost savings, focus marketing resources, and provide UNC with unique programs of distinction and excellence.   Specifically, cost savings from these measures could reduce overall expenditures, contribute to a pool of resources to selectively increase faculty and staff salaries, broaden the available pool of assistantships and scholarships for other graduate programs and

make resources available to expand or create 'in demand' programs.  Streamlining program offerings and or retiring chronically low enrolled programs would increase faculty availability to better serve UG students and improve graduate advising in programs constrained by limited faculty accessibility.

<u>Services or programs to be phased out</u>

The recommendations from this subcommittee are in need of further development and refinement.  The subcommittee decided to conduct an initial review of programs utilizing many of the agreed upon metrics. Subcommittee members individually selected metrics, which included but were not limited to, a three-year history of program enrollments, program-by-program market data, and contextual variables (e.g., UG program offerings, service courses, program location and delivery mode(s), graduate assistantships, etc.) The initial review produced a great deal of discussion and general agreement about identified programs and certificates to retire.  After much discussion and debate and after consultation with the Interim Provost, the committee decided not to publish a list of programs recommended for retirement. The subcommittee arrived at this decision because of the lack of interrater reliability with respect to the metrics and programs to be removed, data from the recommended data were incomplete, and the current process did not provide time for the affected units or college leadership to offer additional contextual variables unknown to the subcommittee. Further, subcommittee members were concerned about the optics and effect of creating and publishing a list of programs to retire without first consulting the affected program.

Therefore, the subcommittee suggests a working group be constituted and charged by the Provost, and drawn from college deans, graduate faculty, graduate students, executive director of Extended Campus, and the graduate dean. The subcommittee suggests they work during the spring 19 term to confirm the metrics and process for portfolio review.  While previous academic portfolio discussions were held with the college deans and previous leadership, this subcommittee urges and supports a collaborative transparent process. Once data, metrics and a process are confirmed, the subcommittee recommends a systematic review to commence in the fall of 2019 conducted college by college of all graduate offerings. This review should include a presentation of the program data and performance relative to the metrics, a discussion with program leadership, college deans and the graduate dean.  Final recommendations for program closures and action plans to teach should be presented to the Provost and President by close of the fall 2019 term.  Once the graduate portfolio review is complete, the subcommittee recommends the program review process be revamped to align and be consistent with the metrics utilized in the portfolio review.

Action Plan Table 3 below presents the required actions related to some but not all recommendations.

Table 3-Action Plan

| Recommendation 1: Create a graduate portfolio review work group | | |
|---|---|---|
| Performance Metric(s): N/A | | |
| Action | Responsibility | Short or Long Term |
| Create an ongoing work group comprised of college deans, 4-5 graduate faculty, 2-3 graduate students, staff and the graduate dean | Provost | Short |
| Identify leadership-co-chairs | | |
| Recommendation 2 | | |
| Performance Metric(s): N/A | | |
| Action | Responsibility | Short or Long Term |
| Finalize portfolio review metrics from committee recommendations | Co-chairs of work group | Short |
| Determine if prioritization or weighting of metrics is warranted | Co-chairs of work group | Short |
| Recommendation 3 | | |
| Performance Metric(s): | | |
| Action | Responsibility | Short or Long Term |
| Determine and request data to support evaluation from IRAS, HR and GSchool | Co-chairs of work group | Short |
| Recommendation 4: | | |
| Performance Metric(s): | | |
| Action | Responsibility | Short or Long Term |
| Conduct systematic review of all graduate offerings-close or combine or continue | Co-chairs and work group | Long |
| Request contextual data from identified programs | Co-chairs | |
| Recommendation 5: | | |
| Performance Metric(s): | | |
| Action | Responsibility | Short or Long Term |
| Identify programs for closure | Co-chairs and work group | Long |
| Prepare recommendations for Provost and President | Co-Chairs | Long |
| Recommendation 6: | | |
| Performance Metric(s): | | |
| Action | Responsibility | Short or Long Term |
| Conduct discussion with identified programs prior to announcing decision | Deans, Co-Chairs of work group | |
| Create a 'teach out' and communication plan with faculty | College Dean and unit leader | |

| Recommendation 7: | | |
|---|---|---|
| Performance Metric(s): | | |
| Action | Responsibility | Short or Long Term |
| Determine nature and role of Extended Campus in graduate education | Provost and President | Long |
| Recommendation 8: | | |
| Performance Metric(s): | | |
| Action | Responsibility | Short or Long Term |
| Revamp program review process to focus on institutional goals | Provost | Long |