Academic Portfolio Review Framework

March 2026

MONTANA
UNIVERSITY SYSTEM

Current Academic Oversight Tools

What We Have Now – Process Driven Decision-making	What We Are Adding – Data to Inform Context and Strategy
✓ Level I / Level II approval process	→ Shared, system-wide portfolio visibility
✓ Request to Plan (RTP) with BOR review	→ Common performance metrics across program/campus types
✓ 3rd and 5th year new program follow-up	→ Data-driven ongoing monitoring (not just periodic)
✓ 7-year academic program review cycle	→ Cross-campus strategic analysis & gap identification
✓ Academic Priorities & Planning Statement	→ Connection between program data & system priorities
✓ Campus mission review & core themes	→ More explicit decision categories (invest / maintain / modify /sunset)

The current policy and handbook are strong on procedural guardrails. The work of the task force adds a strategic and evaluative layer.

We Already Apply Rigor at the Front Door

BOR Policy 303.1 sets explicit criteria for new program approval. This framework extends that same standard to ongoing portfolio management.

BOR Policy 303.1 – New Program Criteria

- ✓ Aligns with MUS strategic plan, campus mission, and mission parameters (BOR 219.1)

- ✓ Demonstrates convincing evidence of student demand, employer demand, or societal need

- ✓ Avoids unnecessary duplication; cannot be delivered more efficiently through collaboration

- ✓ Projected benefits to the state outweigh the costs

- ✓ Institution has capacity to deliver to an acceptable degree of quality

The Gap – What Happens After Approval?

3rd & 5th year follow-ups (new programs only)
Enrollment threshold check only

7-year academic review (all programs)
Comprehensive but infrequent

Between cycles
No system level structured monitoring or triggers

→ **The Portfolio Framework extends 303.1's rigor across the full program lifecycle:**

- Continuous monitoring with dashboard indicators
- Explicit thresholds that trigger review
- Tiered decisions: invest / maintain / restructure / sunset

Component 1: Guiding Principles when shaping MUS Academic Portfolio Review

Student-Centered

Metrics and decisions prioritize student access, success, and post-completion outcomes above all else.

Mission-Differentiated

Performance expectations are calibrated to institutional mission. MSU-Northern is not measured the same as UM-Missoula.

Evidence-Informed, Not Formula-Driven

Data triggers conversation, not automatic action. Context always matters.

Transparent and Shared

Campuses and the system use the same data, viewed together. No surprises.

Responsive to Montana

The portfolio should evolve with the state's economic, demographic, and workforce changes.

Collaborative

System perspective supplements, not supplants, campus-level academic governance and faculty expertise.

Connection to NWCCU Accreditation

The framework aligns naturally with NWCCU 2020 standards on student achievement, assessment of learning, and institutional effectiveness. A well-built portfolio framework serves dual purposes: strategic management and accreditation readiness.

Component 2: Portfolio at a Glance

System-level descriptive measures

908

Total Programs
Across the System

21 students

Median Program
Headcount

157 (17%)

Programs Delivered
Online or Hybrid

293

Unique CIP Codes
Offered System-Wide

Measures of program health

31%

Programs w/ <10 headcount
(major share at certificate level)

24%

Programs down >25% in
enrollment over prior 3 years
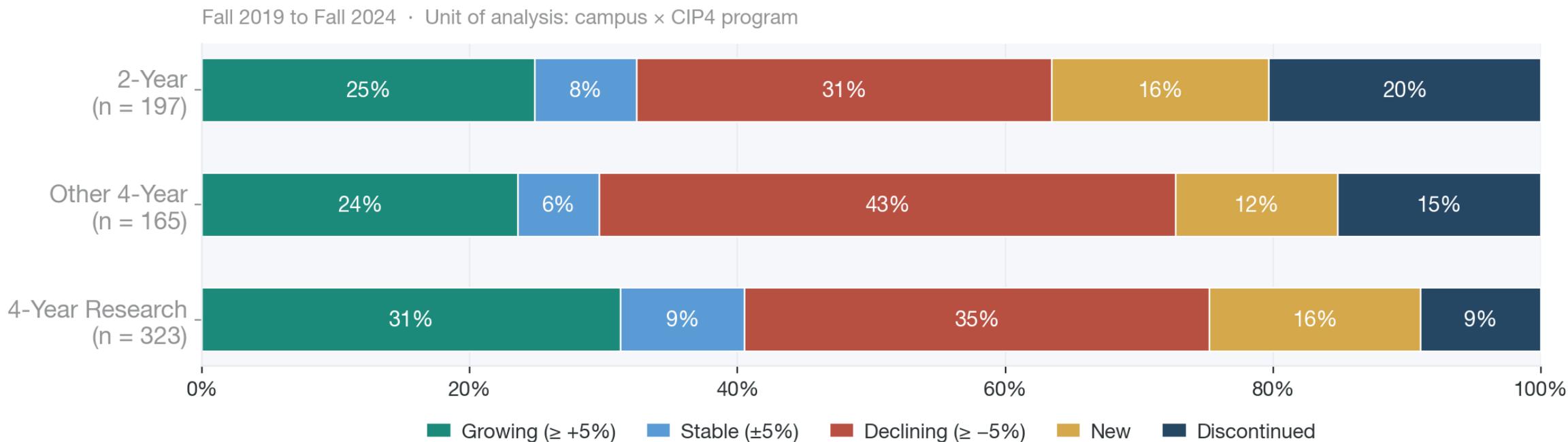
24%

Programs up >25% in
enrollment over prior 3 years

+6%

Growth in graduates in
MT "in-demand" sectors
since 2019

5-Year Program Enrollment Trends by Campus Type

Fall 2019 to Fall 2024 · Unit of analysis: campus × CIP4 program

Campus Type	Growing (≥ +5%)	Stable (±5%)	Declining (≥ −5%)	New	Discontinued
2-Year (n = 197)	25%	8%	31%	16%	20%
Other 4-Year (n = 165)	24%	6%	43%	12%	15%
4-Year Research (n = 323)	31%	9%	35%	16%	9%

Largest increase – 43% of trades programs have grown
Largest decrease – 44% of education programs have declined

Component 3: Performance Metrics

How do we know programs are healthy?

Student Demand & Access

Declared majors / headcount

Geographic draw

Demographic composition

Student Success & Outcomes

Retention & persistence

Time to degree

Completion rate

Post-completion employment & wages

Program Quality

Programmatic accreditation status

Student learning outcomes assessment

Faculty credentials & ratios

Advisory board engagement

Financial Sustainability

Cost per completer

Net tuition vs. instructional cost

Institutional subsidy reliance

Trend direction

Strategic Alignment

Workforce need (DLI projections)

Institutional mission fit

Contribution to system goals

System Dashboard / Context   **Institutional Reporting / Process**

8

Component 4: Decision Framework

How does this information drive system and campus action?

New Program Approval

- Review MUS portfolio context at RTP stage
- Require workforce alignment evidence
- Create decision tiers to guide campus review if thresholds triggered at 3- and 5-year new program review: invest / maintain / restructure / sunset

Ongoing Program Review

- Move from compliance to strategic review
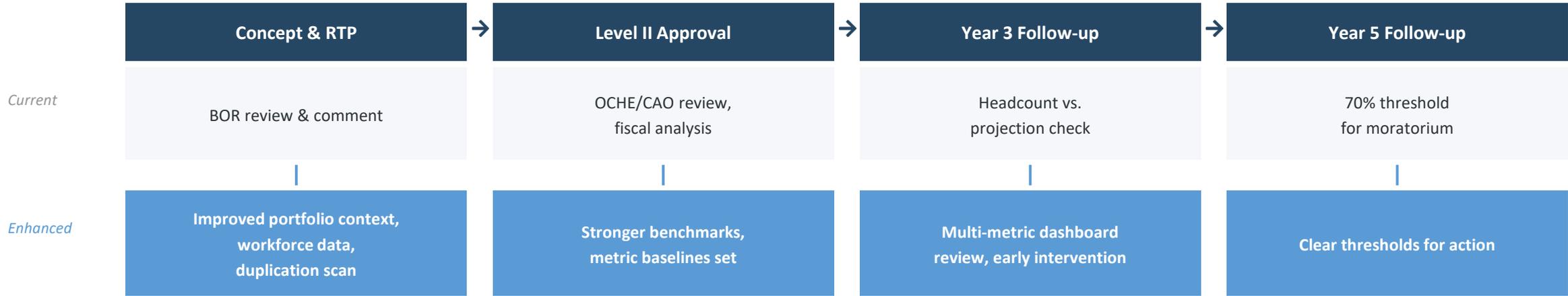- Establish dashboard with threshold indicators for monitoring
- Create decision tiers to guide campus review if thresholds triggered: invest / maintain / restructure / sunset

System Portfolio Management

- Annual system-wide portfolio report to ARSA
- Identify gaps and unmet workforce demand
- Flag geographic and credential-level deserts
- Inform BOR strategic planning & investment

How the Framework and Data Enhance the Program Lifecycle

NEW PROGRAM APPROVAL & REVIEW

Concept & RTP	Level II Approval	Year 3 Follow-up	Year 5 Follow-up

Current

BOR review & comment	OCHE/CAO review, fiscal analysis	Headcount vs. projection check	70% threshold for moratorium

Enhanced

Improved portfolio context, workforce data, duplication scan	Stronger benchmarks, metric baselines set	Multi-metric dashboard review, early intervention	Clear thresholds for action

ALL PROGRAMS — ONGOING PORTFOLIO OVERSIGHT

Dashboard Monitoring
Annual data refresh: enrollment, completion, workforce alignment

→

Threshold Review
Programs crossing floors or trend triggers are flagged for enhanced review

→

Decision & Action
Tiered outcomes: invest / maintain / restructure / sunset

7-Year Comprehensive Review feeds back into monitoring cycle

New programs enter the top track. Once established, all programs are continuously monitored through the bottom cycle.

DISCUSSION & NEXT STEPS

Key questions:

- Which metrics matter most? How do we avoid measuring everything and learning nothing?

- How do we calibrate expectations across missions and contexts? What does mission-differentiated performance look like?

- What role should thresholds play? Triggers for conversation vs. automatic consequences?

- How do we ensure this framework supports (not undermines) faculty governance and campus autonomy?

- What data infrastructure is needed? Can MUS Data Warehouse deliver these metrics consistently?

Proposed timeline

May 2026
Proposed thresholds and policy changes noticed to BOR

July/September 2026
Final draft policy changes on BOR agenda

Spring 2027
Threshold metrics provided to campuses

Fall 2027
First threshold review cycle begins