

# Academic Portfolio Review Framework

March 2026



# Current Academic Oversight Tools

## What We Have Now – Process Driven Decision-making

- ✓ Level I / Level II approval process
- ✓ Request to Plan (RTP) with BOR review
- ✓ 3rd and 5th year new program follow-up
- ✓ 7-year academic program review cycle
- ✓ Academic Priorities & Planning Statement
- ✓ Campus mission review & core themes

## What We Are Adding – Data to Inform Context and Strategy

- ➔ Shared, system-wide portfolio visibility
- ➔ Common performance metrics across program/campus types
- ➔ Data-driven ongoing monitoring (not just periodic)
- ➔ Cross-campus strategic analysis & gap identification
- ➔ Connection between program data & system priorities
- ➔ 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

➔ **This work 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



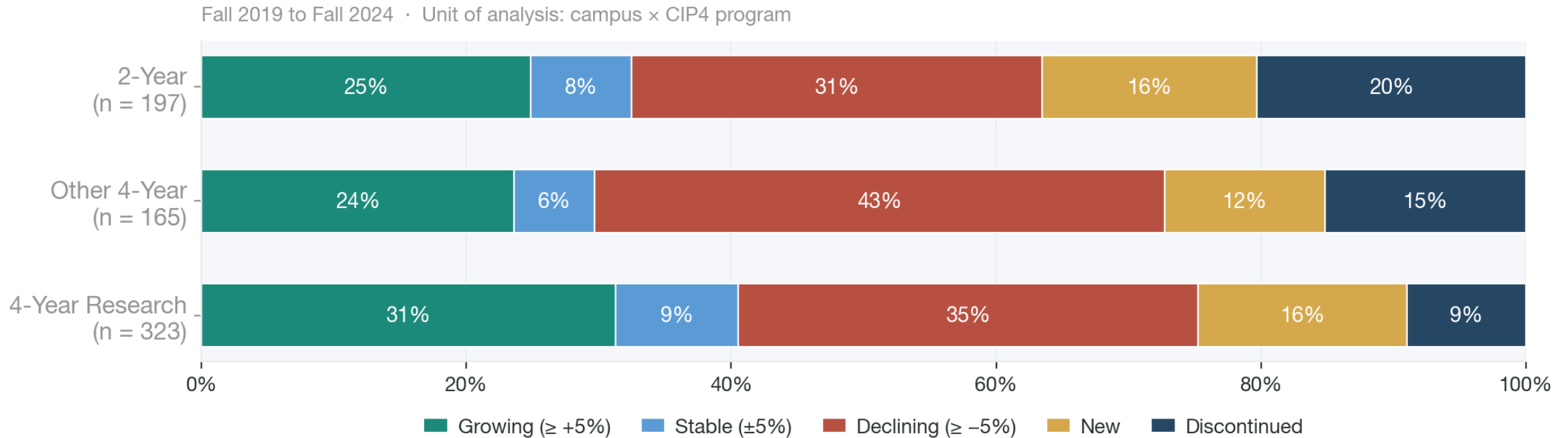
**+6%**

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



## Component 2: Portfolio Description

### 5-Year Program Enrollment Trends by Campus Type



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



# 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

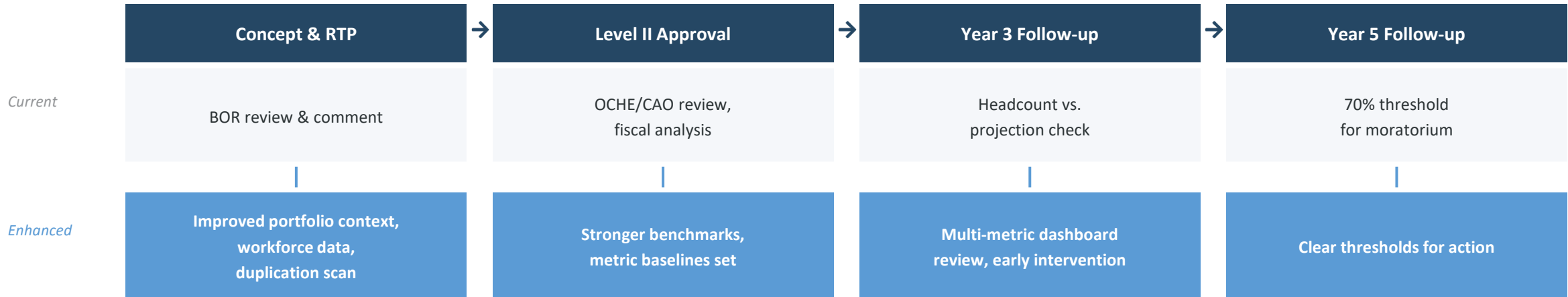
- Move from compliance to strategic review
- Establish dashboard with threshold indicators for monitoring
- Create decision tiers to guide campus review if thresholds triggered: invest / maintain / restructure / sunset

## System Portfolio Management

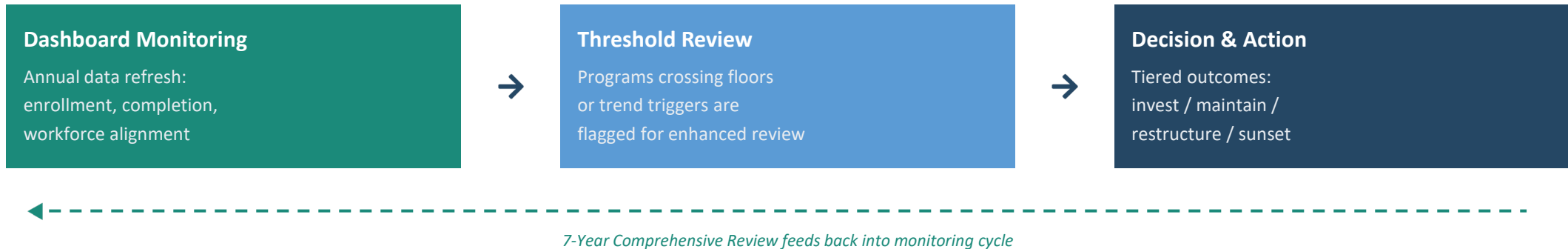
- Annual system-wide portfolio report to ARSA
- Identify gaps and unmet workforce demand
- Flag geographic and credential-level deserts
- Inform BOR strategic planning & investment

# How the Framework and Data Enhance the Program Lifecycle

## NEW PROGRAM APPROVAL & REVIEW



## ALL PROGRAMS — ONGOING PORTFOLIO OVERSIGHT



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

# DISCUSSION & NEXT STEPS

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## 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

