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To: PSU Campus Community

From: Susan Jeffords, Provost and VP for Academic Affairs

Subject: Closing the Gap: Program Review/Reduction Process and Timeline

In the spring of 2021, as part of the University's overall efforts to support institutional priorities and achieve a sustainable budget, the Provost shared with the campus the approach that the Office of Academic Affairs (OAA) is taking towards this goal—Closing the Gap. Closing the Gap includes a number of actions we can take to strengthen the financial health of the university while maintaining our ability to meet the needs of students and sustain our academic mission.

- stabilizing and, where possible, increasing enrollments;
- implementing the Strategic Hiring Freeze;
- realizing savings, where possible, through attrition and vacancies;
- participating in the Support Services Review;
- offering a Retirement Transition Program;
- launching a program review/reduction process.

While we continue to work diligently on all aspects of the Closing the Gap strategy, this memo focuses on one component of Closing the Gap: the Program Review/Reduction Process. This process will continue to be guided by and work in collaboration with the Principles and Priorities developed by the Academic Program Reduction and Curricular Adjustments Committee appointed by the Faculty Senate in October, 2020. The Program Review/Reduction Process will also utilize an equity lens at all stages to ensure that outcomes are informed by our collective racial justice and equity commitments.

The APRCA Principles and Priorities that frame this process are so important to the outcomes of this process that it is worth repeating them here:

Guiding Principle 1: Equitable and Meaningful Engagement of All Stakeholders

An equitable process includes instructional, research, and academic professional faculty of all contract types, undergraduate and graduate students, administrators, staff, and community partners to ensure voices are diverse and fully representative. Equitably accessible participation of diverse voices will generate visionary and sustainable solutions in the design and implementation process.

Guiding Principle 2: Focus on Student Access, Quality Learning Experiences, and Completion

From improving access to higher education at PSU, to the care we provide students on their way to the completion of their degree, all decisions should reflect that student wellbeing is essential to learning. As we contemplate and implement institutional change to prepare students to be the change makers the future requires, we will build on the PSU foundation of a high-impact undergraduate liberal education and productive graduate programs.

Guiding Principle 3: Our Work Will Change, Let's Make it for the Better

Precarious working conditions exacerbate precarious student learning conditions. Resource faculty teaching, student support, and scholarship and research activities that contribute to the PSU mission. Promote and support faculty in the development of new capacities and prioritize collaboration, reassignment, and adaptive solutions rather than layoffs.

Guiding Principle 4: Research and Data Informed Decision Making

All qualitative and quantitative data, national research and scholarship, as well as diverse ways of knowing and best practices, should be contextualized and supplemented with timely analysis to inform decision making. Committees will share metrics and data with the PSU community to gather and integrate input.

Guiding Principle 5: Seek Feedback Prior to Decision Making

Everyone should have the opportunity to participate throughout the process. Details of proposals and their possible impacts will be communicated to the PSU community throughout the process for discussion and should include multiple mechanisms for timely, formative feedback.

Guiding Principle 6: Devote Resources to the ReImagining Process

Institutional reform is necessary, difficult, and time-consuming work that must be planned for and resourced adequately. Therefore, contributions to this work should be balanced in-load, or otherwise fairly compensated, and recognized within professional evaluations. Establishment of a realistic process timeline is necessary to identify the additional resources required.

Guiding Principle 7: Transparent Process and Open Communication with All Stakeholders

The outcomes of this effort will be improved by equitable communication within the system of relationships in which we are all embedded—as faculty, students, staff, community partners, and administrators.

The Program Review/Reduction Process and Timeline will follow the expected procedures and processes of the Faculty Senate and the Collective Bargaining Agreement (CBA).

As suggested in the APRCA Guidelines, the Provost's Office will continue to provide funding to ensure that the ReImagine Initiative is available as a resource to support faculty and staff in contributing to and participating in these processes.

The following is a timeline for implementing the phases of the Program Review/Reduction Process.

Phase I: *Develop Metrics and Dashboards* (fall-winter terms, 2020-21)

- So that there could be a common foundation from which to undertake these conversations, the Provost appointed the Program Reduction Working Group (see Program Reduction Working Group Charge) in the Fall Term, 2020. Supporting several APRCA principles, the Working Group was charged with providing a mechanism to support *data informed decision making;* to ensure *transparency,* the metrics would be represented in dashboards accessible to all campus participants. While it is clear that no set of metrics fully represents any component of OAA, having a common set of metrics that applies to all units supports a goal of transparency and equity as these processes move forward. Co-chaired by Dean of the Graduate School, Rossitza Wooster, and Associate Dean of the College of Liberal Arts and Sciences, Matt Carlson, the committee developed two sets of metrics to be represented in the dashboards:
  - **Driver Metrics**: As those metrics that cause or influence other metrics, Driver Metrics provide critical information as to the overall performance of units* in key areas that influence student outcomes, faculty hiring, and budget. As recommended by the committee, they include:
    - Student Credit Hours/FTE;
    - Three-year trend in number of majors/minors/graduate enrollees (average growth rate);
    - Number of degrees awarded;
    - Total Student Credit Hours (SCH);
    - Percentage of SCH delivered as service courses to other units;
    - Base net revenue from the Revenue Cost Allocation Tool (RCAT);
    - Education & General Expenditures (E&G).
  - **Value Metrics**: These metrics reflect important values of the university and are intended to recognize how units are contributing to those key values. (The committee recognized that it was not possible to find quantitative

measures for all of the university's values but wanted to reflect those that could be shared in a quantitative framework.) Value Metrics will be used only to refine assessments from the Driver Metrics, with a principle focus on the positive contributions units make to these values. The Value Metrics include:

- Percentage of Black, Indigenous and People of Color (BIPOC) faculty;
- Percentage of BIPOC students;
- Research expenditures.

- To be effective, use of the metrics has two priorities:
  - **Transparency**: It is critical that all information be accessible to everyone participating in the Program Review/Reduction Process, including the methods for arriving at the dashboard metrics. To that end, all of the dashboards are available on a university-access Tableau site, and the report of the PRWG Value and Driver Metrics report is available at the Program Review/Reduction Process webpage. Because these discussions have institution-wide impact, the dashboards will include information about all units across campus, including the median campus-wide performance on each metric.
  - **Accuracy**: While the PRWG worked with the Office of Institutional Research and Planning (OIRP) to ensure valid data, it also shared the dashboards with chairs and associate deans in order to answer questions or to identify any needed corrections.

OIRP addressed the issues and finalized the dashboards, based on this review. While the initial dashboards were based on FY20 data, dashboard data will be updated annually throughout this process, with FY21 data available in Fall Term, 2021.

- School/College meetings: The Provost and the PRWG, in partnership with the APRCA committee, shared the Program Review/Reduction Process and the metrics at School and College specific meetings during Spring Term, 2021, to share work-to-date and gather additional feedback. Responses to questions from those meetings have been gathered on the ReImagine School and College Meetings FAQ page. References to the School and College meetings can be found at ReImagine PSU School and College Meetings.

Phase II: *Launch Program Review/Reduction Process Discussions* (Fall Term, 2021 - Winter Term, 2022)

While the Driver and Value Metrics will be common reporting metrics for all units, it is critical to recognize the distinct cultures of Schools and Colleges that shape practices and outcomes, including key factors such as accreditation, balance of graduate/undergraduate programs, etc. Consequently, Phase II will be led primarily by deans to take account of School/College contexts. In keeping with the shared governance commitments of this process and the ongoing collaboration with the APRCA committee, deans will develop consistent and transparent processes for faculty and staff engagement. Deans will meet

quarterly with the APRCA committee to share the processes in their Schools and Colleges. The Provost will ask deans for regular reports to ensure that consistent practices are being followed; the Provost will provide updates to the APRCA committee on these practices. Throughout Phase II, deans will be asked to apply an equity lens to all work and to share information across colleges to ensure that institution-wide goals are being considered.

To initiate Phase II of the Program Review/Reduction process, the Provost will meet with deans in the Fall Term of 2021 to review metrics for their college/school. While it is clear that metrics are only one tool that can be used to get a full picture of School/College performance, Phase II will begin with a review of these institution-wide common metrics. Two options will follow these meetings:

- For units that appear more frequently above the medians on the Driver Metrics, it is expected that information in the dashboards would continue to inform planning at the unit and College/School level. Units that exhibit high demand may be asked for further information as part of an investment process would be incorporated into the regular IPEB budget process;
- The Provost will ask deans to examine closely those units that appear more frequently below the medians on the Driver Metrics. Deans will then request from selected units further information that helps to contextualize the information in the metrics. Units asked to provide reports may request support from the ReImagine Initiative to undertake these efforts. At minimum, reports should address:
  - o Unit contributions towards university-wide Driver Metrics
  - o Unit contributions to Value Metrics
  - o Unit contributions to support student success factors such as retention and degree completion
  - o Unit contributions in providing courses that serve students in their own and other programs
- Units may also provide additional information they believe is relevant. That information may include:
  - o Plans that a unit has underway that may impact future outcomes;
  - o Contributions that cannot be reflected adequately in the dashboards, such as research outcomes, external partnerships and support, national distinction, socioeconomic advancement of graduates, etc.;
  - o Other factors the unit believes would contribute to a clearer picture of the unit's profile.

Deans will meet with the Provost to provide updates and to discuss institution-wide goals to ensure that the process is informed by cross-college/school information.

The Provost will review reports with deans, considering Driver Metrics, Value Metrics, unit narratives, and other factors determined by the unit, School/College, and dean to be relevant. The Provost will ask deans to explore multiple mechanisms for responding to these reports, including possible reorganization.

Based on recommendations from the Deans, the Provost may recommend one or more possible outcomes:

- o A unit may be asked to propose ways in which its contributions could be enhanced through targeted investments that would be considered in the IPEB budget process;
- o A unit may be asked to consider redesign that is informed by the Program Review/Reduction Process. Redesign could include, among other options:
  - Adjusting resources to match student enrollments;
  - Reorganization. Proposed reorganizations will be considered as needed by relevant Faculty Senate bodies;
  - Revision of curriculum/degrees. Any revisions to curriculum will follow all expected Faculty Senate procedures;
  - Use of ReImagine Initiative resources to support faculty in redesigning key program components (curriculum, degrees, etc.) that were identified in the Program Review process.
- o Based on recommendations from deans, the Provost may recommend targeted reductions. Any proposed reductions will follow all Faculty Senate and CBA procedures to ensure participation of the unit and relevant stakeholders. It is expected that the number of Article 22 processes would be limited.

The Provost's Office and deans will continue to partner with the APRCA committee and the Faculty Senate Budget Committee throughout these processes to ensure transparency and participation. The Provost expects deans to report regularly on Program Review/Reduction processes in their Schools/Colleges. The Provost will report regularly to APRCA, Faculty Senate leadership, and relevant Faculty Senate committees throughout this process.

Phase III: Incorporate Program Review/Reduction outcomes into FY23 and FY24 budget processes (Spring Term, 2023)

- Schools and Colleges will begin to incorporate the outcomes of the Program Review/Reduction Process into their budget plans for FY23; because outcomes may not come into effect until the FY24 budget cycle or beyond, bridge funds may be needed to implement outcomes.
- The Provost will share recommended reduction decisions made through the Program Review Process with the APRCA committee as well as relevant Faculty Senate bodies and, where applicable, the unions to ensure that guidelines and processes are followed.
- The ReImagine Initiative will continue to be available throughout this process as a resource for units in undertaking Program Review/Reduction processes.

- The Provost will continue to report regularly to campus on the outcomes of the Program Review/Reduction Process and the impact on Closing the Gap.

*The PRWG worked with OIRP to gather data to develop the dashboards; the director of OIRP served as a consultant to the group. Because the data are organized by department/non-departmentalized unit on the central university database (Banner), this is the definition of "unit" that is used in the dashboards.