Update on Program Prioritization at the University of Idaho
April 2020

I. Introduction

A. Board Policy V.B.11: Program Prioritization

1. The State Board of Education mandates that all universities in Idaho engage in a Program Prioritization process. Results of that process are to be used by each institution as it sets priorities and allocates resources among programs and services. Program Prioritization is intended to direct resources to enable each institution to achieve its Mission, Core Themes and Strategic Plans.
2. Program Prioritization shall be incorporated in the colleges and universities' annual budgeting and program review process.
3. Annual Program Prioritization updates are to be submitted to the Board by the colleges and universities on the date and in a format established by the Executive Director.

B. Board Policy III.F. Program Prioritization

The University of Idaho, Boise State University, Idaho State University and Lewis-Clark State College shall integrate program prioritization into their respective strategic planning, programming (academic and nonacademic) and budgeting processes. As part of the program prioritization process, the institutions shall conduct an evaluation of programs and services with specific and tangible objectives, and with a focus on specific evaluation criteria.

1. All academic programs shall be evaluated with an emphasis on:

a. External demand
b. Quality of outcomes
c. Costs and other expenses.

2. Additional criteria may be considered by institutions to evaluate programs. These criteria can be weighted within the evaluation process as the institution determines appropriate. Criteria may include:

a. History, development and expectations of the program
b. External demand
c. Internal demand
d. Quality of inputs and processes
e. Quality of outcomes
f. Size, scope and productivity
g. Revenue and other resources generated
h. Costs and other expenses
i. Impact, justification and overall essentiality
j. Opportunity analysis

3. Criteria for evaluation of non-academic programs may include:

a. Key objectives and how they are measured
b. Services provided and to which customers
c. Position-by-position analysis
d. Unmet needs and demands
e. Opportunities for collaboration and restructuring

f. Opportunities to share skill sets and resources
g. Opportunities for cross-training
h. Technological improvements that are cost effective
i. Process improvements to streamline operations
j. Outsourcing exploration to improve service and cut costs

These criteria may be weighted as each institution determines appropriate.

4. Academic and non-academic programs shall be evaluated and grouped into quintiles based on relative cost efficiency and effectiveness.

All program reviews shall include an indicator of which quintile the program falls into. Annual program prioritization updates shall provide a description of the progress achieved toward implementing findings and recommendations. These are to be submitted annually to the board by the institutions in a format and timeline established by the Executive Director.

5. Institutions shall conduct program prioritization at least once every five years. Final reports must include:

a. Programs that will be improved through advancements in efficiency, quality, productivity, and focus.
b. Opportunities for improvements to organizational structure and function
c. Programs considered for consolidation or discontinuation as based on cost of delivery and degree of relevance and impact.
d. Estimated institutional savings and efficiencies created through implementation of recommendations.

6. As part of program planning processes pursuant Board Policy III.Z. and postsecondary program approval and discontinuance processes pursuant to Board Policy III.G. institutions must provide the board with information on how planned and proposed program action addresses needs identified from program prioritization.

7. Program prioritization processes must involve a diverse range of stakeholder representation at each institution. Methodology will be reported to the Board and must be transparent to institution communities while meeting the outcomes defined in this section of Board Policy.

C. Rationale to Conduct Academic Program Prioritization: The University of Idaho's current budget circumstances and cost reduction efforts engage all areas of the university's operations. The majority of university expenditures are committed to the academic areas of the institution. To ensure that careful, data informed decisions are made when considering those efforts in the academic areas a task force comprised of faculty and staff led the effort to conduct and complete a program prioritization process during FY20. Information gathered during that process formed the basis of analysis for the committee in formulating recommendations regarding program closures, consolidations and potentially other actions such as investment in high performing programs.

II. Background

In 2013, the State Board of Education (SBOE) mandated that all universities engage in program prioritization as a way to address the Governor's zero-based budgeting requirement. Their intent was for

institutions to critically review their academic programs and non-academic support functions, building a culture of continuous improvement and internal reallocation to meet each institutions' highest goals and objectives instead of reliance on new monies from the State of Idaho. This approach is based on Robert Dickeson's framework for clarifying institutional purpose and setting academic priorities, described in his book *Prioritizing Academic Program and Services: Reallocating Resources to Achieve Strategic Balance*.

Program Prioritization 2013-2015: The SBOE-mandated 2013-2015 effort by interim leadership was branded "Focus for the Future" to highlight the need for a renewed approach, given the SBOE's interest in an ongoing process. The process initially resulted in a prioritization that the SBOE found to be not compliant with their guidelines. Results and analysis were revised to meet the Board's requirements and led to six moved/restructured degrees, five program consolidations, one name change and nineteen discontinued programs. For example, the closure of the Office for Community Partnerships released over $460,000 that was invested in faculty positions in international studies, the College of Natural Resources, and additional base funding for the Library. The process was heavily criticized by the UI community for being accomplished in closed door meetings among the interim provost and deans, and for inaccurate and incomplete data used to evaluate interdisciplinary programs (programs whose metrics are not captured in Banner or F&A distribution). Interdisciplinary programs were moved into colleges without measures to ensure existing students did not suffer in the transition, and without mechanisms to continue and to measure participation by faculty outside the college of program residence.

Program Prioritization 2015-2017: New leadership worked with faculty senate in 2015-16 at the behest of the SBOE to continue to improve the program prioritization process at the UI. Updates regarding this new program prioritization were provided to the SBOE in August 2015 and August 2016. UI moved into its next improvement cycle of our program prioritization process in 2017. This process is embedded in our annual budgeting cycle and has yielded significant resources that have been dedicated toward university priorities. UI assessed overall program priority by evaluation against three criteria:

1. Essentiality to the University of Idaho's mission (20% weighting)
2. Contribution to the University of Idaho's strategic plan (50% weighting)
3. Institutional financial investment in Banner departments (30% weighting)

This approach reflected the university community's desire to align our program prioritization and strategic planning efforts.

In Fall 2017, the two highest priorities identified by the University Budget and Finance Committee (UBFC) were competitive Teaching Assistant (TA) support packages and investment in faculty and staff salaries to improve market competitiveness. Program prioritization identified $2 million in funding to commit to those efforts. This funding was coupled with an additional $2 million in anticipated new tuition revenue and centrally reallocated funds, to meet the required $4 million target for increased compensation. The funding of our TA packages to competitive levels resulted in a significant increase in new graduate student enrollment in the subsequent Fall. The salary increases for faculty and staff addressed longstanding equity issues across many dimensions of our demographics. In addition, we applied a 1.86% flat rate contribution from prior year unspent general education budgets to yield $500,000 of one-time funds for updated Zoom videoconferencing resources and to address emerging needs in University Communications, the library and Staff Council.

The results of the program prioritization process informed another $5 million in permanent base general education funding reductions in Fall 2018. Given the significant base reductions required in academic programs, the Provost instituted a position control mechanism where faculty position turnover is managed at the University level rather than at the College or department level. Of the $5 million in reallocated base funding, $3 million was utilized to address ongoing tuition revenue shortfalls and the remainder was

invested in UBFC priorities, while providing a small strategic reserve for the new president. One-time unspent general education budget accumulations contributed at a rate of 6.87% to yield $1.5 million for investment in faculty start up, University Communications, the Graduate College recruiting efforts, and the College of Art and Architecture technology upgrades.

The 2015-2017 Program Prioritization Process was highly successful in generating and applying funds to priority areas. It was heavily criticized by the UI community for the lack of a supporting basis for the choice of weighting factors. Thus, the next process sought improvement in determining initial metrics.

III. Taskforce Selection and Meetings:

a. **Committee Members:**

Member Name (16 w/ JW & MS)	Employee Type/Work Unit	Email
Rachel Halverson, Chair	Faculty (CLASS)	rhalverson@uidaho.edu
Peter Allen	Faculty (COS)	pballen@uidaho.edu
Jim Alves-Foss	Faculty (COE)	jimaf@uidaho.edu
Linda Chen	Faculty (CBE)	lindachen@uidaho.edu
Louise-Marie Dandurand	Faculty (CALS)	lmd@uidaho.edu
Ryan Long	Faculty (CNR)	ralong@uidaho.edu
Phillip Scruggs	Faculty (CEHHS)	pwscruggs@uidaho.edu
Barb Cosens	Faculty (LAW)	bcosens@uidaho.edu
Randall Teal	Faculty (CAA)	rteal@uidaho.edu
Cindy Ball	Staff (Chemistry)	bogar@uidaho.edu
Christian Elsberry	Staff (Advancement Services)	celsberry@uidaho.edu
Kris Freitag	Staff (OSP)	kfreitag@uidaho.edu
Ginger Carney	Dean (COS)	gingercarney@uidaho.edu
Marc Chopin	Dean (CBE)	mchopin@uidaho.edu

b. **Staffing:** Terry Grieb (Chair, Faculty Senate) and Chad Neilson (Chair, Staff Council) selected committee members. They strove to ensure representation of all colleges, faculty ranks, and staff. Eight members of the committee had been assigned to serve on the UBFC.

c. **Role of Consultants:** Given their disciplinary expertise, David Yopp and Rob Ely were invited to consult with the task force to ensure the assessment methods adopted by the task force were valid statistically. Professor Yopp wasalso a member of Re-Envisioning Another Program. Prioritization (REAPP) task force which made recommendations about how to improve the program prioritization process following the efforts of 2017-18. Rob Ely attended the taskforce meeting on January 10, 2020. David Yopp and Rob Ely also met separately with the Provost to discuss possible evaluation methods for the committee to employ when evaluating program presentations.

d. **Role of the Provost:** Given the accelerated timeline for completion of the taskforce's work, the Provost was present at each meeting of the task force up until the point that selected programs were asked to make presentations to the task force, and guided the taskforce's articulation of the program prioritization process, collected and analyzed data as instructed and supplied the taskforce with

documents for review and keeping the taskforce moving forward with endorsement and/or amendment of the program prioritization process.

e. Number of Meetings/Topics Addressed:

There were six meetings preceding program presentations to the task force: December 13, 2019; January 7, 2020; January 10, 2020; February 7, 2020; February 24, 2020; and March 5, 2020.

December 13, 2019 (3 hours):
- Review of Academic Prioritization Process done in 2017, including recommendations from REAPP (re-envisioning another program prioritization) that the first stage of the process use quantitative measures and the second stage of the process use qualitative measures.
- Discussion of formation of a small committee to review programs' mission centrality. The taskforce agreed on the following composition: President, Provost, Dean, Department Chair/Head, Faculty member and Staff member. Ben Hunter will chair the committee.
- Discussion of RBA formula and populating quintiles, including not ranking individual programs within quintiles.

January 7, 2020 (3 hours):
- Review of 2017 program prioritization process: 20% mission essentiality, 50% contribution to strategic plan, 30% institutional E&G financial support.
- Review of president's charge for 2020 and REAPP recommendations. Discussion of revenue attribution based on 50% conferrals and 50% student credit hours.
- RBA Formula:

$$RBA = \frac{(Tuition + F\&A + G\&A - GenEd\ Budget)}{GenEd\ Budget} * 100\%$$

- Further discussion of weighting of conferrals and student credit hours.
- Overview of Current Process Steps Identified:
  1. Quantitative (RBA)
  2. Small Committee Determination of Mission Centrality
  3. APP (Academic Program Prioritization) formulates recommendations and identifies programs for closure.
  4. Provost shares results with IPEC and the deans.
  5. Recommendation to the President
  6. Appeal Process with the President

January 10, 2020 (3 hours):
- Rob Ely attended this meeting as a guest consultant.
- There was extensive discussion of whether the 50/50 mix of tuition and SCH is appropriate. The committee came to an agreement that the exact weighting will be set after some sensitivity testing. For the testing process, program names will be removed, consistently giving an alpha description. A sensitivity analysis will determine the weights where rankings are most stable. This will drive the discussion at the next meeting on February 7, 2020.
- The committee continued its discussion of the appeal process. It was decided that the programs identified for elimination give a presentation to the committee consisting of no more than five slides, one point per slide. The committee would work with David and Rob to develop a rubric to evaluate the presentations. Its recommendations to the president would be based on their evaluation of the presentations. These presentations also could be recorded for the president to review as he is making the final decision.

- Presentation protocols will be discussed at the next meeting.

February 7, 2020 (2 hours):
- Jodi Walker, Director of Communications, attended this meeting as a guest.
- The committee reviewed the results of the sensitivity analysis and agreed to use 54% for SCH and 46% for conferrals. This weighting appeared to produce rankings that are close to the average rank for any given program and minimized the maximum deviations from the average ranking. This weighting scheme was used to assign tuition revenue and calculate the Return on Budget Allocated (RBA). In the final analysis step, an overall ranking was determined using a weighted scoring of 80% RBA and 20% Mission Essentiality.
- The presentation process for selected programs was revisited and defined further:
  1. Maximum of 5 PPT.
  2. 10-minutes presentation; 20 minutes for Q&A.
  3. Considerations such as job placement, grad school placement, alumni giving, and philanthropy may be included in the presentation.
- The committee chose to attempt to identify $2.5 million in savings.
- It was reinforced that the information discussed by the committee is confidential.
- Next Steps:
  1. Data will be disseminated to the deans for their review. The Provost will work with them to clarify the number of programs in the fifth quintile slated for elimination.
  2. At the committee's next meeting, members will review the data: RBA, rank by RBA, rank by mission essentiality, 80/20 RBA/mission score.

February 24, 2020 (1.5 hours):
- Discussion of reports and recommendations from deans.
- The committee identified the programs in the fifth quintile that would be invited to give a presentation to the committee: Geography, Geology, Interdisciplinary Studies, Materials Science, and Music.

March 5, 2020 (2 hours):
- Jodi Walker attended this meeting as a guest.
- Current efforts on the part of the Registrar and Cher Hendricks to review the catalog and reduce the number of options and emphases were shared with the taskforce.
- Taskforce chair updated the members on the e-mails sent to Geography, Geology, Interdisciplinary Studies, Materials Science, and Music to provide additional information.
- The provost shared the decision not to ask Geology and Interdisciplinary Studies to provide additional documentation.
- The taskforce agreed to review the additional documentation provided by Geography, Materials Science and Music and to complete a poll to indicate whether they felt the program needed to present to the taskforce. Polling results determine which programs present to the taskforce.
- The taskforce finalized the presentation format:
  1. Pre-Presentation Taskforce Discussion (30 Minutes)
  2. Program Presentation (10-minute presentation; 20 minutes for questions from the taskforce)
  3. Post-presentation Discussion to Articulate Recommendation (30 Minutes)

Presentation Schedule:
Geography –Wednesday, April 1, 2020
Materials Science – Friday, April 3, 2020
Music – Monday, April 6, 2020

IV. Resulting Recommendations:

Programs closed in recent past but still on inventory (clean up and standard processes)

J.D. Law-Litigtn & Alt Disp Res Emph

LL.M. Law

M.S. School Counseling

M.Ed. School Counseling

Grad Academic Certificate Adv Materials Technology

P.S.M. Nat Res & Envr Science

B.S. Music-History & Lit Emph

Emphasis Areas to be removed or merged

B.S. Physics-Applied Physics Emph

B.A. Organizational Sciences

Programs to be Discontinued Voluntarily (did not request appeal to Taskforce)

M.A. Philosophy

Grad Academic Certificate Analog Integrated Circuit Dsgn

Grad Academic Certificate Organizational Dynamics

Grad Academic Certificate Bioregional Plng & Commun Design

Grad Academic Certificate Urban Design

M.S. Bioregional Plng & Commun Design

M.S. Rehab Couns & Human Services (1 Tenured Faculty separation – found new position as part of transition of the program to ISU)

Program recommended for merger/restructuring by Academic Program Prioritization Taskforce

B.S. Geography – will be merged with Geology

Ph.D. Geography – will be merged with Geology

Geography

1. Ballot Results:[1]
   a. Materials submitted were adequate to take action: 12 voted "yes"; 1 voted "no."
   b. Recommendation: 0 voted to "Close the program"; 13 voted to "Adjust the program for success."

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[1] Please note that one APP Taskforce member abstained due to conflict of interest.

2. The APP Taskforce supports Geography's plan to merge with the Department of Geology, rebrand its major, and intensify its recruitment efforts. This produces a cost savings of circa $70,000 (Administrative Coordinator; Chair's stipend).
3. The taskforce recommends that Geography explore additional steps to increase its RBA. Suggestions include, but are not limited to (note that to improve RBA in the short term, a and b would need to result in reductions in number of faculty):
    a. Increasing teaching loads;
    b. Increasing class size;
    c. Reducing general education expenses;
    d. Increasing grant funding.

4. Annual review of the program should be undertaken to ensure that the changes implemented are producing the desired cost efficiencies and program effectiveness.

Note: Geography and Geology will merge to form a new academic department which will realize some cost savings for administrative costs and offer opportunity to build on shared research interests. The Geography faculty will be reduced via non-renewals of probationary tenure track faculty and non-tenured faculty.

Program recommended for closure by Academic Program Prioritization Taskforce

B.S.M.S.E. Materials Science & Engr (6 Tenured/Tenure Track Faculty will be issued nonrenewal pending SBOE approval)

Materials Science

1. Ballot Results:
    a. Materials submitted were adequate to take action: 13 voted "yes"; 1 voted "no."
    b. Recommendation: 9 voted to "Close the program"; 5 voted to "Adjust the program for success." These are the only two choices on the ballot. The next bullet indicates that the committee was in agreement with recommending the College's plan.
2. With the understanding that a graduate program in Materials Science and Engineering in Idaho Falls will not require general education funds, the APP Taskforce is unanimous in its support of the College of Engineering's plan to eliminate the B.S. Materials Science and Engineering on the Moscow campus and to move the Ph.D. Materials Science and Engineering to Idaho Falls.
3. The APP Taskforce recommends annual review of the graduate program in Idaho Falls by the taskforce, the dean, and the department chair to assess its viability.

Progam recommended for adjustment for success by the Academic Program Prioritization Taskforce

Music

1. Ballot Results:
    a. Materials submitted were adequate to take action: 8 voted "yes"; 6 voted "no."
    b. Recommendation: 4 voted to "Close the program"; 10 voted to "Adjust the program for success."
2. The potential for improved fiscal performance was unclear from the information presented by the Director of LHSOM in response to the taskforce's questions. The Task Force recommends that the LHSOM and CLASS leadership work to clarify the expected outcomes from the proposed adjustments and to explore additional measures beyond efforts to increase enrollment to improve

the RBA. More information, for example, is necessary to determine whether eliminating B. Mus. Music Business Arts and Administration, Entrepreneurship emphasis, and General emphasis would produce a cost savings.

3. The APP Taskforce would like to emphasize that steps need to be taken to increase RBA and ensure the financial viability of the program. Short-term measures to improve RBA cannot rely on possible future increases in enrollment. Steps need to be taken to decrease costs and to increase revenue to ensure the financial viability of the program. The APP Taskforce recommends annual review of the LHSOM to assure budgets are reduced and revenues monitored appropriately.

V. Recommendations for Improving Academic Program Prioritization

The APP Taskforce offers the following recommendations for future APP processes:

1. We recommend that the APP Taskforce be convened annually to ensure that the process is continually updated and refined to produce consistent and useful information to improve the delivery and cost efficiency of academic programs. To provide continuity we recommend that the APP Taskforce members be appointed for 3 years, and to stagger appointments so that 1/3 of the Taskforce rotates onto and off the taskforce each year. Managing taskforce membership and appointments in this way will ensure at any given time institutional memory is embedded within the taskforce, while enabling a diverse and evolving contingent of faculty and staff to be engaged in the program prioritization process.

2. Quantitative and qualitative data considered during the last three program prioritization efforts have changed markedly. We recommend that university leadership work with faculty leadership and representatives of college level leadership to identify criteria that may be relied upon for more than one program prioritization cycle to inform decisions and recommendations related to program closure, investment, and related decisions. In particular, we recommend a reexamination of the use of the weighting of various factors. Despite criticism of the use of weighting in the 2015-2017 process, the 2020 process continued to do weighting (albeit at a reduced level). If weighting is used, we recommend establishing a basis for the weight of each metric that can be clearly articulated and transparent when explained to a general audience. An arbitrary weighting should not be considered sufficient.

3. We recommend an effort to acknowledge and count the interdisciplinary work that occurs outside or across programs and departments. The 2015, 2017, and this 2019/20 process have all shown that the University does not collect metrics for interdisciplinary work. Banner does not track this work and F&A is not tracked beyond the lead PI. If financial metrics are to be used for evaluation and if the University seeks to continue to hold out interdisciplinarity educational opportunities and research to be among its strengths, we must have a reliable and easily accessed means of determining:
   a. grant collaboration outside or across programs;
   b. graduate advising outside or across programs;
   c. degree/certificate/emphasis participation outside programs;
   d. and creative and scholarly activity that raises UI's reputation in areas with limited funding

4. We recommend that the next APP Taskforce reflect on whether program with concentration is the appropriate level of review and suggest that the taskforce solicit input from the deans as to which level is most appropriate to avoid arbitrary assignment of costs and benefits. The current process

looked at certificates, degree emphasis/concentrations, and all individually named degrees offered at the University. The committee recognizes that University funding models do not naturally align with degree programs, especially when those degrees are interdisciplinary in nature.

5. We recommend that future program prioritization processes provide more time for review of programs and documents, and have times set aside to meet with only members of the taskforce present early in the process. In addition, the timeline forced parallel rather than sequential processes between APP and the efforts of Colleges to meet budget reductions. This resulted in use of data prepared for APP, but not yet vetted or finalized by APP, by some deans as they considered their budget reduction strategies. We recommend future prioritization processes provide timelines that allow for deliberative, sequential processes and that provide more transparency in the data (i.e. provides a full data set) and spreadsheets. Specifically, the academic program prioritization process should be completed before budget reallocation processes take place. It is important for a future APP committee to review the data sets and models used so that they can further refine the metrics and ensure that we are collecting data that accurately informs a program prioritization process that best aligns with the university mission.

APPENDIX I

President's Charge to the Academic Program Prioritization Taskforce: Develop a two-step process:

1. Use quantitative metrics (program majors, Student Credit Hours (SCH) taught, research expenditures, F&A (Facilities and Administrative revenue associated with grants) generation, degree production, etc.) to do initial identification of programs upon which to focus additional analysis and potential closure.
2. Use additional qualitative metrics (program quality, national reputation, potential future growth, etc.) to recommend potential closures to IPEC.