PROGRAM PRIORITIZATION

Idaho State Board of Education
August 13, 2014

Program Prioritization Process Milestones

- Program Prioritization Directive & Zero-base Budgeting
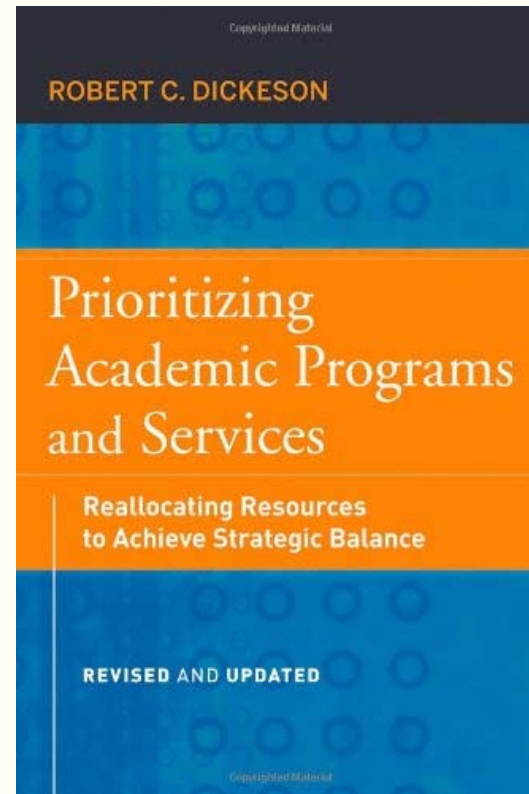- Board Action & Progress Reports
- Board Staff Guidance
- Implementation and Next Steps

PROGRAM PRIORITIZATION DIRECTIVE & ZERO-BASE BUDGETING

The Case for Prioritization

- Academic programs are the heart of the institution and drive costs for the entire campus

- Academic programs have been permitted to grow without regard to their relative worth

- Most campuses are striving to be all things to all people, rather than focusing their resources on mission critical programs

- Growing incongruence between programs and resources to mount them with quality

- Traditional approaches (like across-the-board cuts) tend toward mediocrity for all programs

- Reallocation is necessary and requires responsible prioritization

Program Prioritization

- "Direct the institutions to institute a prioritization of programs process consistent with [Dr. Robert] Dickeson's prioritization principles and that in the June [2013] meeting the institutions identify for the Board the framework and targets associated with such process; and to direct the institutions to use a quintile prioritization approach and communicate to the Board the criteria and weighting to be used after consultation with their respective campuses." – *Board of Education May 2013*

- "Citizens have a right to expect public officials to act responsibly, and a duty to hold public officials accountable. That's especially true when it comes to how their money is spent – which is why I plan to implement Zero-Base Budgeting for all state agencies and institutions, beginning with fiscal 2010." – *Gov. Butch Otter, 2008 State of the State Address*
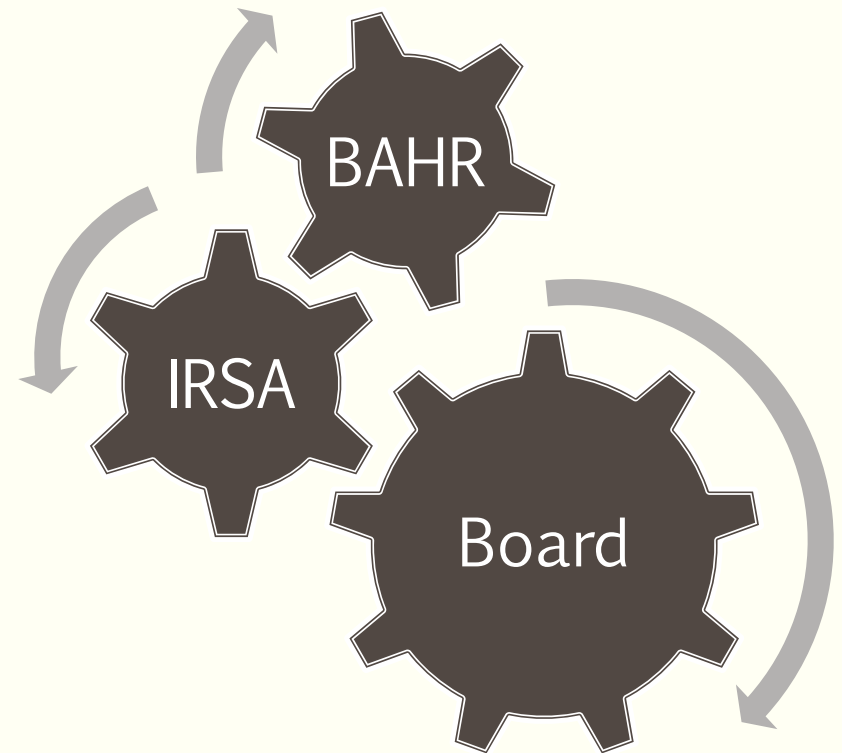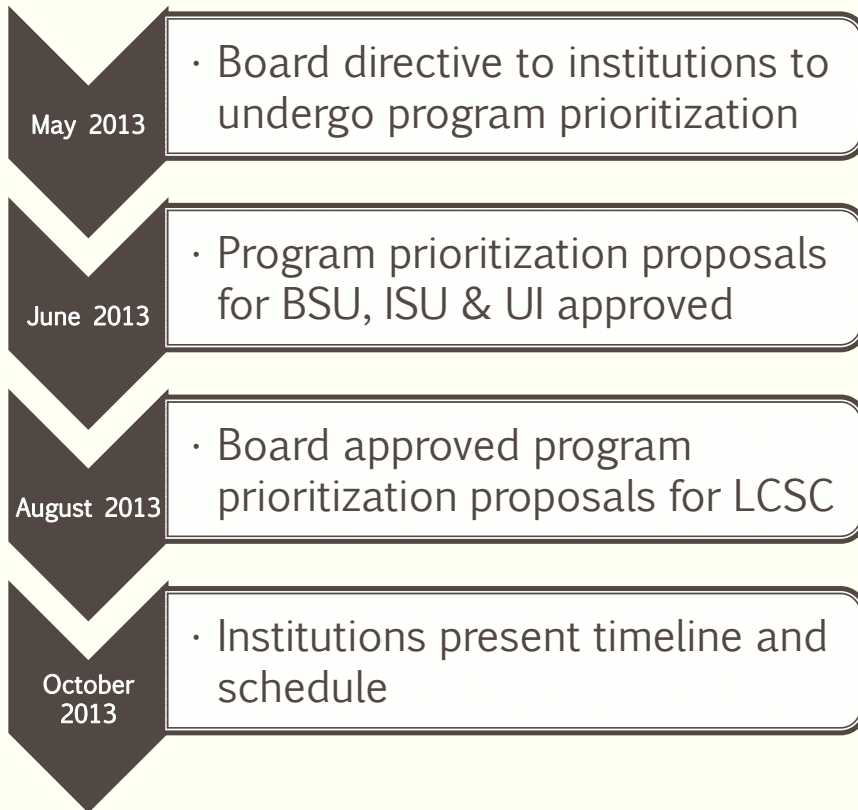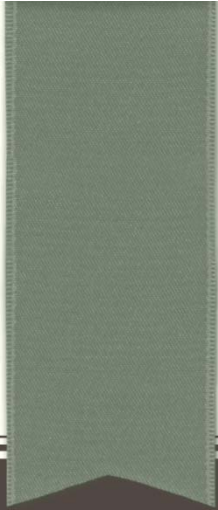
pro·gram *noun* \ˈprō-ˌgram, -grəm\

Any activity or collection of activities that consumes resources (dollars, people, time, space, equipment)

Outcomes

- Rigorous evaluation and prioritization of programs

- Not intended as purely a budgetary exercise

- Sustainability: "Comprehensive process that would be ongoing"

BOARD ACTION & PROGRESS REPORTS

Board Action & Progress Reports

May 2013	· Board directive to institutions to undergo program prioritization
June 2013	· Program prioritization proposals for BSU, ISU & UI approved
August 2013	· Board approved program prioritization proposals for LCSC
October 2013	· Institutions present timeline and schedule

BAHR

IRSA

Board

BOARD STAFF GUIDANCE

Guidance Memos from CAO and CFO

July 22, 2013

EVALUATING & QUINTILING ACADEMIC AND ADMINISTRATIVE PROGRAMS

- ❖ Scoring and ranking academic and administrative programs together using the same rubric was not necessary and in some cases not appropriate

- ❖ Less concerned with programs being placed into quintiles in the truest mathematical sense, than about quintiles being used in the process

- ❖ The more divergence there is in the use of quintiling, the harder it becomes to assess rigor

EVALUATION CRITERIA

- ❖ Criteria and the weighting thereof are central to the mission of the process

- ❖ At least 5 or 6 criteria are necessary to ensure rigor, with a reasonable balance between quantitative and qualitative

Guidance Memos from CAO and CFO

September 6, 2013

EXPECTATIONS & DELIVERABLES: FINAL REPORT

❖ Present recommendations for academic and non-academic programs by sorting the programs into their quintile rankings

❖ For academic or non-academic programs that will require some form of action, institutions should provide greater detail in a narrative format on the proposed action. Actions could fall within the following categories :
  ➢ Enrich/Expand
  ➢ Consolidate
  ➢ Restructure
  ➢ Probation/Watch List
  ➢ Discontinue/Eliminate

❖ Should also include recommendations or plans for use of any efficiencies/savings achieved or other desired outcomes

Four Key Areas

- Rigor of the process
- Fulfillment of zero-base budgeting principles
- Achievement of impactful outcomes
- Sustainability of process improvements

Joint Meeting: Provosts and VPs for Finance

Oral Presentations

· Institution's overarching goals
· Measurement criteria and the units of program analysis
· How many programs were evaluated and how many programs were placed in each quintile
· Common factors that led to programs placed the top or bottom quintile
· Lessons learned and actions being taken, including considerations of sustainability

Written Reports

· Narrative of the process explaining the level of rigor applied
· Templates of process documents used to collect the data
· Key milestones and dates throughout the process
· Aggregate number of programs in each quintile
· Programs held harmless
· Key outcomes and recommendations
· Timelines for next steps

IMPLEMENTATION & PROPOSED NEXT STEPS

Implementation & Proposed Next Steps

- Streamlined or truncated process for facilitating programmatic changes based on the Program Prioritization results.

- Program Prioritization and the 5 Year Plan

- Implementation Progress report(s) to the Board
    - February 2015
    - August 2015
    - Standing agenda item for IRSA

Streamlined Process

- A temporary departure from strict adherence to Board Policy III.G

- Proposed 3 strand template (will discuss at CAAP)

  1. No approval/notification to OSBE. Applies to the following:
     a) Shifting the location/house of a program or department within a college
     b) New minors, options, emphases

  2. En masse or "batch" approval. Applies to the following:
     a) Program discontinuations
     b) Consolidation into an existing program
     c) Certain types of new certificates

  3. Standard process. Applies to the following:
     a) New programs
     b) Consolidation into new programs
     c) Bifurcation or "splitting" of existing programs
     d) Expansion of programs to off-campus sites

Relationship to Five-Year Plan

- Five-Year Planning was suspended last year to focus on Program Prioritization

- Program Prioritization could lead some institutions to add/delete programs in their Five-Year Plan

- Late August – Institutions will begin process of updating Five-Year Plan

Idaho Statesman

MOSTLY SUNNY

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AUGUST 10, 2014

96° / 67° SEE A17

Idaho colleges on the spot with program review

Findings from schools' re-examinations will be presented to the state this week.

BY ELIZABETH RUDD AND MARY STONE
LEWISTON TRIBUNE

If Idaho's four-year public colleges and universities took seriously the charge to conduct a review of all their programs, they should know what their strengths and weaknesses are — and ways to improve.

If they didn't, they might have to do the process again, said State Board of Education member Richard Westerberg, who heads the committee overseeing the reviews.

The program prioritization review was mandated by the state board in May 2013 for the University of Idaho, Boise State University, Idaho State University and Lewis-Clark State College. The schools will give reports on their progress, as well as possible action plans, when the board meets at 1 p.m. Wednesday at Idaho State University in Pocatello.

The prioritization process fulfills a mandate from Gov. Butch Otter that state agencies re-examine their budgets and programs. The schools used criteria such as outcomes and net revenue to place programs into one of five categories, ranging from "highly successful" to

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QUESTIONS?