Wednesday, November 12, 2014

To: Vice Presidents, Deans, Department Chairs, and Administrative Program Directors

From: Prioritization Steering Committee Co-chairs

Subject: Access to Prioritization Plus System & Resource Guide for Academic and Administrative
                Program Authors

After several months of preparation, the data analysis phase of prioritization begins today. Over the next two months, November 12, 2014 – January 12, 2015, you will have time to complete and submit a program analysis form for your academic or administrative program, using the Prioritization Plus (PPLUS) software data system. The Prioritization Plus system provides an orderly way to keep track of responses, manage who has access to program data, ensures that all authors are looking at the same thing, and allows you to work from anywhere, at any time through the use of your preferred browser.

Much work has been expended by the Data Team in gathering, collecting, and providing the most accurate and meaningful data for analysis. An initiative of this magnitude, with over 288 academic programs and over 100 administrative programs, requires both a quantitative measure of data: enrollment, revenue and expenditures, and program staffing tables, and a qualitative measure that allows for context. Doing prioritization this way provides an opportunity to tell your program's story beyond the numbers or, at the very least, provides an opportunity to describe the data presented in the program analysis forms.

If through review of your program analysis form you believe that any information is stated incorrectly or that the data provided do not reflect your program's impact or contribution to Lehman College, please address this in your program report with supportive information. If you have any questions about logging into the PLUS software, the rating rubrics, or adding additional users to your programs PPLUS access, <u>please refer to the attached Prioritization Resource Guide</u>.

Thank you for your commitment to this process, to Lehman College and to advancing our vision by affirming our values.

Thank you,

Anny Morrobel-Sosa   Vincent Clark

Co-chair, Prioritization Steering Committee   Co-chair, Prioritization Steering Committee

PRIORITIZATION RESOURCE GUIDE FOR ACADEMIC AND ADMINISTRATIVE PROGRAM AUTHORS

The information provided in this guide was developed to assist you in accessing, navigating, and completing the Program Analysis Form. Please use the Table of Contents to help you navigate the document.

Table of Contents

PRIORITIZATION OF PROGRAMS AND SERVICES:
Advancing the Vision, Affirming our Values.

The prioritization initiative at Lehman College is a transparent and inclusive evaluation process that focuses on examining all academic and administrative programs and services, focusing on their efficiency, effectiveness, and centrality to the College's mission, within the framework of shared governance. The prioritization process is the continuing implementation of our Strategic Plan: Achieving the Vision. The goals are:

- Determine the strategic allocation of existing resources.
- Identify opportunities for generating new resources, based on how our programs and services contribute to student success and to Lehman's identity.

Economic projections suggest that state government support for higher education is not likely to increase significantly in the foreseeable future. Consequently, a significant portion of the resources needed to strengthen and/or expand existing programs and/or to establish new programs and will have to come from a reallocation of existing resources. The exploration of new strategies to move Lehman College beyond a sustainable academic and financial model into one that is stronger and innovative is essential to the College's future.

This resource guide is designed to provide program authors and users with information pertaining to the Academic and Administrative & Academic Centers and Institutes Program Analysis Forms housed in the Prioritization Plus Software.


PPLUS: ACCESSING THE PPLUS SYSTEM
The Prioritization Plus system provides an orderly way of keeping track of responses, managing who has access to program data, ensuring that all authors are viewing the same information, and allowing for work to be done anywhere and anytime with a browser.

Log In
After you receive your log in information, you can log in to the PPLUS software at
www.prioritizationplus.com

Your username is your email name. After logging in with your temporary password, you will be prompted to create a new password. Please do not share your new password with other users.
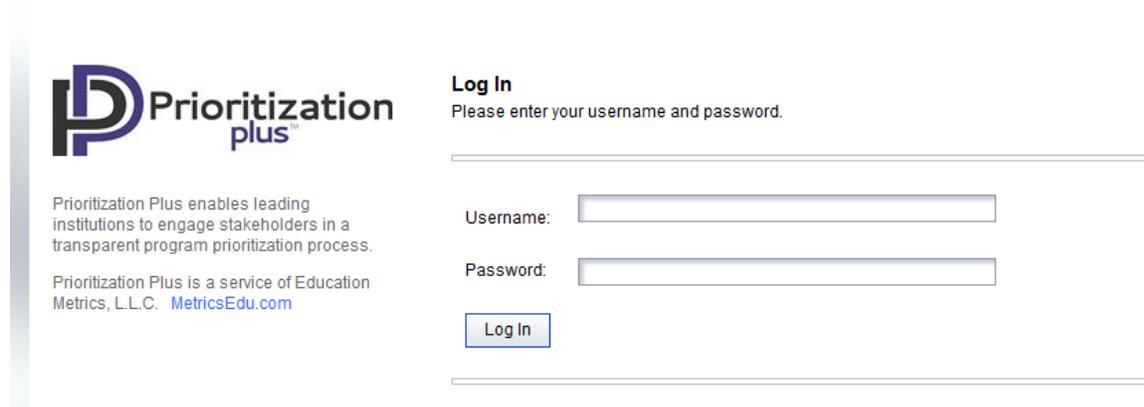
PROGRAM IDENTIFIERS

Academic Degree Programs are identified by the academic degree plans offered through a department and will appear in the Prioritization Plus software as illustrated below:
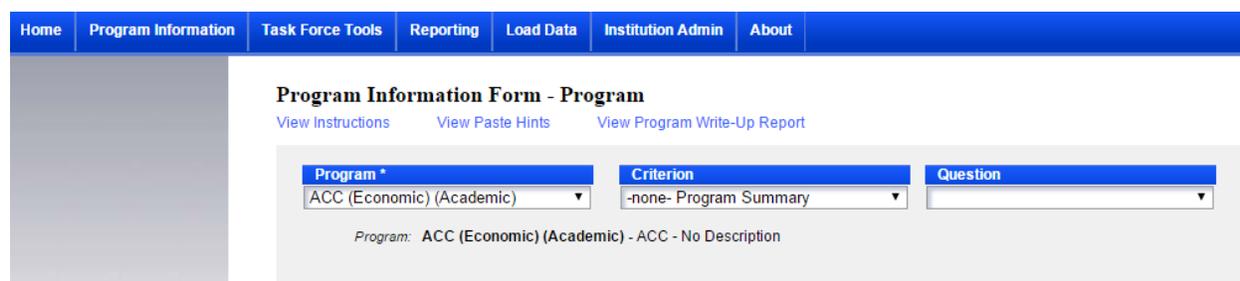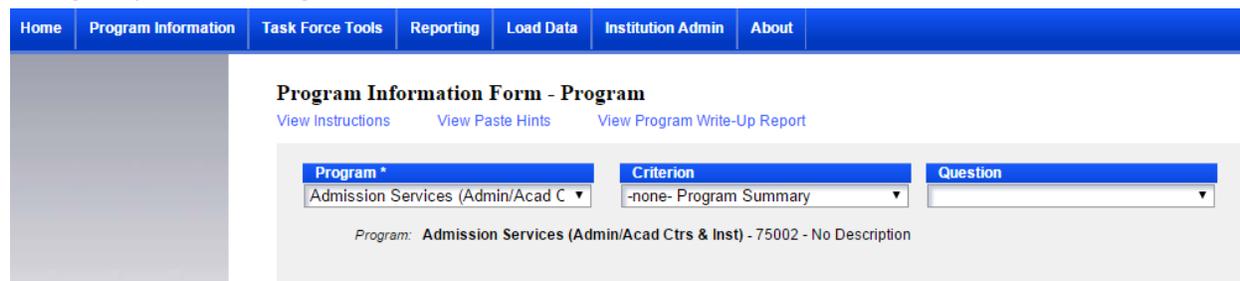

Administrative and Academic Centers & Institutes[*] are identified by their CUNYfirst/Lehman College department budget code and name.

*If a program has a sub-budget code and/or its own director, please contact Patrick L. Valdez at program.prioritization@lehman.cuny.edu to discuss the necessity of manually uploading the program for purposes of completing a program analysis form specific to those resources.

PPLUS: AUTHOR ACCESS CONTROL

Only Authors and Reviewers have access to your drafts until they are approved. As stated during the author trainings, deans and vice presidents serve as "Reviewers." Please note that the Lehman Support Team has access to your drafts in order to provide assistance as needed.

While it is possible to add multiple authors to a single program, we recommend that program analysis forms be completed as a writing team. If you would like to add multiple authors, please contact Patrick Valdez at program.prioritization@lehman.cuny.edu.

PPLUS: SUBMISSION OF PROGRAM ANALYSIS FORM

Electronic program analysis forms will be available on November 12, 2014 and must be submitted on or before January 12, 2015. NOTE: As Reviewers, deans and vice presidents are responsible for the final submission of all forms. When complete the Reviewer marks the program as Approved. Only then is the write-up available for publishing and to the Task Force. Submitted program analysis forms will be available on the Prioritization website after January 12, 2015.

PPLUS: LEVELS OF PROGRAM ANALYSIS FORM

To gain access to your academic or administrative program, drag the mouse over the "Program Information" tab and select Edit Program Information.

- Edit Program Information will allow you to select a specific Program, Criterion, and Question to complete:

PPLUS: QUESTION INSTRUCTIONS AND DATA SOURCES

To view special instructions and data sources for criterion questions, click on the View Instructions link.

Clicking on the **View Instructions** link will open a window that provides special instructions and list all data sources used to populate the question's data table.

PPLUS: PROGRAM WRITE-UP REPORT

To review a summary of the program analysis write-up and report, drag the mouse over the Reporting tab and select Program Write-up Report under PROGRAMS.

This view will prompt you to select a specific program (Fig. 1) that will provide a Program Write-up Report (Fig. 2) that can be exported as a PDF, Excel, other files or web formats*.

Figure 1

Figure 2

*After exporting the report, go back to Edit Program Information.

PPLUS RESOURCES

Once you have logged in to the PPLUS system, you will have access to several training guides and short videos listed under the "About" tab. You are encouraged to review the resource guides, which can be downloaded as a PDF, and watch the videos to help you navigate the software.

DATA SOURCES

A variety of sources were used to populate the data tables found throughout the program analysis form. The sources of data are identified under the following categories.

Enrollment Data

Enrollment, graduation, student credit hours are reported by the Office of Institutional Research, Planning and Assessment (OIRPA). OIRPA reports official Lehman College data through the publication of an annual fact book. Information pertaining to IR data is queried from Institutional Research Data Base (IRDB), which is the official Data Source for CUNY.

OIRPA also provides comprehensive, reliable information to internal and external constituencies in support of decision making, program evaluation, strategic planning, and assessment. The Fact Book and all IR reports are public information and can be found at http://www.lehman.edu/institutional-research/index.php

CUNY's Office of Institutional Research (OIRA) can be found at http://www.cuny.edu/about/administration/offices/ira/ir.html

For more information, please contact:

Dr. Susanne Tumelty, Director of Institutional Research, Planning and Assessment
Shuster Hall, Room 308
718-960-1190
susanne.tumelty@lehman.cuny.edu

Human Resources Data

Human Resources data is reported by the Office of Human Resources. Information pertaining to HR staffing is queried from CUNY Fully Integrated Resources & Services Tool (CUNYfirst)* as of Sept 1, 2011; September 1, 2012; and September 1, 2013. Any changes in personnel after September 1, 2013, are not reflected in the HR tables. Please identify any changes in your program analysis form.

The Office of Human Resources provides strategic support and effective guidance in the areas of recruitment, benefits, compensation, employee relations, and staff development—all while promoting an environment of diversity. Information about the Office of Human Resources can be found at http://www.lehman.edu/human-resources/index.php

For more information, please contact:

Eric Washington, Director of Human Resources
Shuster Hall, Room 230
718-960-8181
eric.washington@lehman.cuny.edu

Budget Data

Budget data is reported by the Office of Budget and Planning. Information pertaining to Revenue and expenditures was queried from CUNY Fully Integrated Resources & Services Tool (CUNYfirst) and Lehman Online Management Reporting System (LOMRS) as of October 2014.

The Office of Budget and Planning provides the highest level of quality and support for the preparation, implementation and control of the College's financial planning and budgeting process; the pursuit of additional financial resources on behalf of the College; and to ensure compliance with approved College budget structure in support of CUNY and Lehman College's mission and goals. Information about the Office of Budget and Planning can be found at http://www.lehman.edu/administration/budget-planning/index.php

For more information, please contact:

Bethania Ortega, Director of Budget and Planning
Shuster Hall, Room 077
718-960-8819
bethania.ortega@lehman.cuny.edu

IMPORTANT NOTES ON THE DATA TABLES (Please read)

Enrollment Data (Criterion 3)
- Enrollment data is reported at the academic degree program level. Source: Office of Institutional Research, Lehman College Fact Book (2011; 2012; 2013).

Program Staffing Data (Criterion 4)
- Human Resources data is reported at the department level. Source: Office of Human Resources, CUNYfirst HCM and LOMRS effective on September 1, 2011; September 1, 2012 and September 1, 2013.
  NOTE: Please do not use or provide any private information that is protected under CUNY or FERPA guidelines.

Program Size, Scope, and Productivity Data (Criterion 6)
- The work flow summary data is comprised of census enrollment and course data (official IR census data), CUNYfirst HR information (queries as of Nov. 2014) and HR employee data (Office of Human Resources, CUNYfirst HCM and LOMRS effective September 1, 2011; September 1, 2012 and September 1, 2013). It will be attached as a pdf to Criterion 6: Program Size, Scope and Productivity (academic program analysis form).

Revenue and Expenditure Data (Criterion 7) - **Office of Budget and Planning data is provided at the department level.**

- Tuition Revenue
  - Graduate level: Seats sold, multiplied by billed credits multiplied by tuition rate. CUNYfirst data downloaded September/October 2014.
  - Undergraduate: Seats sold multiplied by billed credits multiplied by average tuition rate. The average is based on a weighted average of all undergraduate tuition rates.
  - **NOTE:** Information used to provide revenue was generated using course-level data (seats sold multiplied by billed credits multiplied by tuition rate per semester) for each department. Tuition revenue was not calculated by the total number of students enrolled in the academic degree program for the semester.

- Expenditures Data
  - Personnel Service Regular –PSR: State payroll system (PayServ) is the source of these numbers. LOMRS provided the departmental structure breakdown.
  - Personnel Service Adjuncts and Temporary Services: Lehman Online Management Reporting System –LOMRS is the source of this data. Titles included are teaching and non-teaching adjuncts, college assistants, student aides, IT hourlies. Sub-accounts are reported under the default department (i.e. 227B reported as 227).
  - Other than Personal Service –OTPS: LOMRS is the source for FY2012 and FY2013. CUNYfirst is the source for FY2014. Sub-accounts are reported under the default department (i.e. 221A/B reported as 221).
  - Departments can login into LOMRS and/or CUNYfirst to verify and review the details of their numbers.

SPECIAL NOTES ON PRIORITIZATION

- Macaulay Honors Programs (MHP) - Academic departments are not required to complete a program analysis form for the Macaulay Honors Program, but students enrolled in MHP have been assigned to the department of their home academic degree program.

- Inactive Programs –Inactive academic degree programs do not have to submit a program analysis from; however, it is imperative to identify these programs and any students listed as enrollees in these programs. if students are reported as enrolled in an inactive academic degree program, please contact Patrick L. Valdez at program.prioritization@lehman.cuny.edu.

- Service courses are courses that support academic degree programs other than those of their specified major.

- CUNYfirst provides real-time data that reflect changes made to course enrollment, human resources, and budget and planning data on a daily basis. Sourced CUNYfirst data will be identified by the date that the data was queried from the CUNYfirst system.

GLOSSARY OF TERMS FROM AUTHOR/APPROVER GUIDE (EDUCATION METRICS, 2014)

- *Author* - A *User* who is assigned the responsibility for preparing the program write-ups for one or more programs. Any *User* can be assigned to an author role. If multiple authors are assigned to the same program they should be prepared to work together on the write-up because only one write-up will represent the *Author Team*.

- *Criteria* - The standards or benchmarks by which programs will be evaluated and prioritized. Information related to a *Criterion* is gathered through the answers to one or more *Criterion Question*s that are designed to highlight performance against the *Criterion*.

- *Criterion Question* - The Criteria Questions are the specific requests for information related to a criterion that will guide the authors.

- *Department* - A department is the organizational unit to which programs are assigned.

- *Prioritization Criteria* - The set of *Criteria* by which programs are rated is central to how your institutional values and strategy are reflected.

- *Program Type* - Two types of *Program*s, "Academic" and "Administrative and Academic Centers and Institutes" each with their own set of criteria have been established. Where it makes sense for different groups of programs to be prioritized using different sets or *Criteria* and optionally, by different task forces, a separate *Program Type* is used.

- *Program* - A program is any activity undertaken that consumes or generates resources. It is the unit of analysis of the prioritization project.

- Reviewer – A "reviewer" has final approval for a program write-up and marks the write-up as complete. The reviewer also has Author access and can participate actively on the team with the authors for the program. All academic deans and administrative vice presidents are assigned as reviewers.

- *School* - A *School* is the higher organizational unit to which departments are assigned

- *Steering Committee* - The group of individuals assigned to design and oversee the entire program prioritization process.

- *Task Force* - A representative team of strategic thinking individuals who will be responsible for reviewing all the program write-ups, providing useful comments and for assigning a score to criteria or questions depending on the scoring options.

- *User* - The term *user* has two meanings depending on context. Most generally it refers to any person with access to Prioritization Plus^{tm} by means of a *Username* and password.

- *User Role* - The *User* may have one of four roles assigned. Most *Users* have a role of "*User*." Users will receive additional privileges and access dependent on their assignments as *Author*, *Approver*, or *Task Force* member. A few *Users* will be assigned the role of *Institution Support*, *Institution Administrator*, or *Task Force.*

PROGRAM PRIORITIZATION WEBSITE

For information and regular updates pertaining to our Prioritization initiative, please visit
http://www.lehman.edu/program-prioritization/index.php

The following information can be obtained at the Lehman College Prioritization website:

- About Prioritization
- Working Groups and Members
- Working Timeline
- Open Forums
- Program Analysis Forms
- Resources
- Frequently Asked Questions

PRIORITIZATION CONTACT INFORMATION

For more information or if you have any questions about Prioritization and the Prioritization Plus software, please contact:

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Office of the Provost
347.577.4108 (office)
program.prioritization@lehman.cuny.edu