

# Plan for Institutional Vitality and Organizational Transformation (PIVOT)

## Introduction

Portland State University's Office of Academic Affairs (OAA) and Research & Graduate Studies (RGS) are launching the **Plan for Institutional Vitality and Organizational Transformation (PIVOT)**, a multi-year initiative designed to ensure PSU's academic portfolio, administrative structures and services align with its priorities in the context of our financial realities and PSU's long-term financial sustainability goals. PIVOT builds on our [Bridge to the Future](#) plan that was launched in fall 2024 and draws on PSU's long-standing tradition as a welcoming and supportive university, one committed to providing learners from all backgrounds with affordable, high-quality education and opportunities for a brighter future. At its core, PIVOT affirms PSU's commitment to academic excellence, student success, and deep engagement with our community, while advancing the priorities outlined in the university's strategic plan, [Future in Focus](#).

The plan addresses a projected \$35 million structural deficit<sup>1</sup> over two years as part of a broader institutional strategy to restore PSU's financial health. PIVOT focuses on academic programs and academic administrative structures, ensuring that our strategic imperatives guide decisions while keeping fiscal realities at the forefront. Through this work, OAA and RGS will contribute their share toward deficit reduction while also creating capacity for reinvestment in educational excellence, student success, employee engagement, and PSU's public mission. PIVOT is not intended to resolve the entire deficit, but rather to serve as a critical pillar within the university's comprehensive financial realignment efforts, while positioning PSU to reinvest in growth and transformation.

PSU's projected deficit is the result of continued declines in enrollment, rising costs, and decreases in both research funding and state support. Unfortunately, this year's deficit follows closely on the heels of the shortfall we worked to mitigate last year, which forced very difficult decisions, including the elimination of positions held by valued members of our community. These reductions also raised questions about the adequacy of our budget indicators, the transparency of our processes, and the role of shared governance in decision-making. In addition, delays in communication and uneven campus engagement contributed to frustration and diminished trust in how choices were made. We recognize that the announcement of an even larger budget deficit will understandably heighten frustrations, fears, and anxieties across campus and in the community, especially as many are still processing the impacts and uncertainties of last year's reductions.

We are not alone in facing these challenges. Like many higher education institutions nationwide, PSU is navigating profound shifts that we cannot ignore. Increasingly, students are choosing alternatives to four-year degrees and are seeking programs that emphasize career preparation, flexibility, and clear pathways to employment and advancement. To remain relevant, we must examine our program offerings, not only for their content but also for their accessibility and modes of delivery. At the same

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<sup>1</sup> This forecast assumes that our expense base will remain unchanged, apart from estimated inflationary cost adjustments. Revenue projections are based on three key assumptions: (1) Student credit hour (SCH) forecast from December 2024, provided by the Office of Institutional Research & Planning; (2) A forecast for the Public University Support Fund (PUSF) that accounts for both overall reductions and a continued decrease in PSU's share due to lower enrollment relative to other Oregon Public Universities; (3) A 5% annual tuition increase.

time, changing student demographics require us to rethink how we provide advising and support services that meet the diverse needs of our students. Federal funding for research has also declined significantly, placing additional strain on PSU's budget and infrastructure. Together, these pressures are reshaping the higher education environment, underscoring the need for PSU to adapt with creativity and purpose.

Together, we must address the systemic aspects of both our academic programs and our academic administrative structures to ensure that PSU delivers the highest quality and most relevant education and support services, while doing so within the realities of our budget. We cannot simply attempt to do more with less; instead, we must make deliberate choices about what to stop doing to create space for new approaches and priorities. For the foreseeable future, the most reliable resources available to us will be those generated through deficit reduction and new revenue streams created by this plan. Innovation and revenue generation are therefore just as essential as cost containment. The status quo is no longer an option. Achieving meaningful, transformational change will require us not only to act decisively but also to navigate the transitions that such change inevitably brings.

Achieving our financial sustainability goals will demonstrate that we prioritize students and our community. By addressing the structural deficit, we will not only stabilize our budget but also create funds to reinvest in the priorities that matter most. These investments will allow us to solve persistent challenges and build a stronger foundation for the future:

- **Students will experience a more straightforward, more seamless path to graduation**, as reinvestment strengthens advising, course availability, and program design.
- **Advising and support will be easier to navigate**, with resources redirected toward high-impact services that help students stay on track.
- **Our programs will be better aligned with workforce opportunities**, supported by new investments in areas of high student and employer demand.
- **Faculty and staff will benefit from reduced duplication and clearer roles**, freeing resources that can be reinvested in teaching, research, and employee development.
- **Research and creative activity will be sustained and more resilient**, with reinvestment helping faculty and students pursue cutting-edge scholarship despite external funding pressures.
- **The university community will gain renewed capacity to invest in growth**, shifting from managing decline to funding innovation and revitalization.
- **PSU's reputation for educational quality and care for its people will be strengthened**, as reinvestment restores pride and trust in the institution.

PIVOT, as its name suggests, is both a shift in perspective and a call to action. It is designed to help us learn from past experiences and do better: i.e., to engage more fully, communicate more regularly, seek meaningful input, address concerns directly, and correct missteps before they become lasting problems. It is a commitment to continuous improvement, shared purpose, and building a stronger, more vital university together.

The central question before us is not whether to rebuild what once was or retain the status quo, which we know is no longer sufficient, but whether we have the imagination and courage to reinvent ourselves and this great institution. Rebuilding restores what was lost; retaining holds on regardless of utility; reinventing creates what is needed. PSU's future depends on our willingness to choose the latter.

This report outlines PIVOT's goals, guiding principles, and modes of engagement and communication. It acknowledges lessons learned from the past, including concerns raised by the Faculty Senate during the Bridge to the Future process. It demonstrates how those lessons shape a more transparent, collaborative approach. The report describes PIVOT's two-track framework, identifying core deliverables, the role of each track in contributing to deficit reduction, and the major steps and timelines for implementation. It also addresses how we will adapt to both internal and external changes and be prepared to respond to what society needs from a great institution of higher education. Additional details are provided in the appendices. ***Above all, the report is intended to present a proactive, forward-looking plan, and to invite the campus community into ongoing dialogue about its goals, outcomes, and approach.***

Please note, this document will be finalized by October 3, 2025 having taken into account input and feedback from multiple sources including: ALT, President's Executive Council, Board of Trustees, external consultant, faculty and staff. However, this does not mean it is a static document. Feedback regarding the Plan will continue to be gathered and considered as we work together to achieve our goals. The Plan will also be revised and adjusted on an annual basis to review progress, changes to our internal and external contexts and new opportunities and challenges.

## Table of Contents

Introduction.....	1
Table of Contents.....	4
PIVOT Goals.....	5
How We Will Reach Our Goals Together.....	5
Guiding Principles.....	6
Modes of Engagement and Communication.....	6
Context and Lessons Learned from the Past.....	7
Overview of the PIVOT Approach.....	8
Track 1: Academic Program Optimization.....	9
Track 1 Core Deliverables.....	9
How Track 1 Will Contribute to Budget Deficit Reduction.....	10
Track 1 Implementation Steps.....	11
Track 2: Assessment of Academic Support Units, Centers/ Institutes, and Administrative Structures.....	15
Track 2 Core Deliverables.....	15
How Track 2 Will Contribute to Budget Deficit Reduction.....	17
Track 2 Steps.....	17
Coordination and Collaboration Across Track 1 and Track 2.....	20
Conclusion.....	21
Appendix I: How PIVOT Addresses Faculty Senate Concerns Regarding the Bridge to the Future Plan.....	22
Appendix II: Logic Model Approach to Impact, Cost Control, and Sustainability.....	25
Appendix III. The Program Vitality Report.....	27
Appendix IV: Metrics for Program Vitality Domains (Track 1).....	29
Appendix V: Program Classification Framework.....	35
Appendix VI. Unit Vitality Profiles (Track 2).....	38
Appendix VII. Classification Framework for Centers/Institutes, Academic Support Units, and Administrative Structures.....	41
Appendix VIII. Timeline.....	43

## PIVOT Goals

To help us achieve this transformation, PIVOT's goals are to:

- **Contribute to Structural Deficit Reduction** by ensuring academic programs and administrative structures address their share of PSU's \$35 million shortfall, reducing costs while creating funds to reinvest in high-priority initiatives.
- **Strengthen Academic Excellence** by aligning programs with student demand, labor market needs, and PSU's mission so that our academic portfolio is both relevant and resilient, with resources directed to areas of greatest impact.
- **Advance Student Success and Equity** by improving retention, persistence, and completion rates, particularly for first-generation, Pell-eligible, and historically underrepresented students, through reinvestment in advising, support, and course access.
- **Support Faculty and Staff Engagement** by fostering a transparent and collaborative process that values shared governance, unit-level expertise, and employee experience, ensuring that efficiencies generate resources that directly benefit the campus community.
- **Enhance Institutional Efficiency** by streamlining administrative structures and support units to reduce duplication, increase effectiveness, and improve service delivery, freeing capacity for innovation and growth.
- **Leverage State and External Funding** by aligning enrollment, degree production, and demographics with Oregon's Student Success and Completion Model (SSCM) and other external opportunities, so that PSU can maximize public investment in its students and programs.
- **Build Long-Term Resilience** by creating sustainable structures that allow PSU to adapt to changing demographics, economic conditions, and educational demands, while ensuring the university remains financially stable and academically strong in the years ahead.
- **Create a culture of continuous improvement** by transitioning from a short-term incremental change mindset to a longer term systemic change mindset that will allow us to become a more adaptable, nimble and sustainable organization.

While the projected shortfall is \$35 million, the responsibility for solutions will be shared across the institution, including academic, administrative, and auxiliary units. Achieving these goals will not only stabilize PSU's finances but will also generate funds that can be reinvested in academic quality, student support, and research excellence. Importantly, PIVOT represents one part of a broader fiscal strategy, building on and contributing to the Bridge to the Future 2.0 plan, that, taken together, will allow PSU to move beyond short-term deficit reduction toward long-term transformation. In this way, reinvestment becomes both the outcome of fiscal discipline and the foundation for PSU's future vitality.

## How We Will Reach Our Goals Together

A core principle of PIVOT is that the process must be transparent, inclusive, and predictable, while remaining decisive in advancing PSU's financial and strategic goals. To that end, communication and engagement are paramount and designed to build trust, keep the campus informed, ensure the accuracy and context of data and findings, and provide meaningful opportunities for faculty, staff, and unit leaders to shape outcomes through consultative input.

Equally important, PIVOT seeks to create a more coherent and satisfying work environment by reducing inefficiencies, clarifying roles, and aligning resources with institutional priorities. This

commitment extends beyond financial health to include the employee experience and the university's academic mission. We will invest time and create opportunities for reflection and feedback, ensuring that lessons learned become embedded in PSU's decision-making processes going forward.

## Guiding Principles

- **Shared Leadership:** Academic leaders, faculty, and staff will collaborate with central leadership to interpret data, define priorities, and recommend actions. Faculty and staff leaders will be engaged as key contributors and champions of change.
- **Clearly Defined Roles, Responsibilities, and Accountability:** PIVOT will establish clear roles, responsibilities, and accountability for leaders and units. Both academic programs and administrative/support units will be held to consistent standards of review and contribution.
- **Transparent Communication and Education:** PIVOT will include a plan for building campus understanding of its goals and for communicating progress and outcomes regularly, openly, and in accessible formats.
- **Mission-Driven Decisions:** All choices will prioritize long-term sustainability and alignment with PSU's mission and the *Bridge to the Future* plan, rather than focusing solely on short-term financial savings.
- **Evidence and Data-Informed Tools:** Instruments such as the Program Vitality Report will provide structured data and context to guide collaborative planning. These tools are designed to support decision-making, rather than serving as ranking mechanisms or final verdicts.
- **Unified Approach:** Strategies will break down silos and strengthen cross-institutional collaboration and cooperation.
- **Sustained Engagement:** PIVOT is a multi-year initiative that emphasizes ongoing review, iterative improvement, and continuous consultation with partners. It represents an enduring strategic commitment, not merely a short-term response.
- **Quality of Work Environment:** The structural realignment will take into account the employee experience, reducing inefficiencies, clarifying roles, and ensuring that resources align with institutional priorities.
- **Transition Management:** Change will be managed by acknowledging what is being lost or restructured, recognizing the "messy middle" of implementation, and planning proactively for a smoother transition to revitalized, reorganized, or new programs and structures.

Finally, **shared governance** will continue to play both a determinative and consultative role. Governance is determinative in areas such as curriculum, degree requirements, and program creation or elimination, where decisions must follow Faculty Senate processes. In other areas, such as budget allocations, organizational design, or administrative structures, governance input is consultative, ensuring that leadership decisions are informed by faculty expertise, contextual knowledge, and PSU's values.

## Modes of Engagement and Communication

To ensure transparency, build trust, and create genuine opportunities for two-way communication, PIVOT will use the following modes of engagement and communication across the campus community:

- **Governance consultations and determinations:** Faculty Senate committees, deans, and unit leaders will engage at defined milestones. In some cases, Faculty Senate approval or formal action will be required to finalize frameworks or classifications.
- **Unit-level dialogues:** Department chairs, directors, and program leads will facilitate discussions with faculty and staff to contextualize findings, surface concerns, and identify implications at the unit level.
- **Leadership meetings:** Deans and central administration will hold structured discussions with governance bodies to ensure alignment between unit perspectives and university priorities.
- **Campus-wide engagements :** University-wide engagement activities and forums will provide updates and offer opportunities for the broader community to ask questions, express concerns, share suggestions and input, and offer feedback.
- **Targeted surveys and feedback mechanisms:** Brief, focused opportunities for written feedback will be provided on specific frameworks, data interpretations, or recommendations. A Transition Monitoring Team will serve as an impartial representative group to “take the pulse” of the campus and provide regular feedback to leaders.
- **Digital hub:** A central website will host updates, FAQs, and timelines to ensure transparency and equitable access to information.
- **The PIVOT Pulsecheck:** A regular update distributed to academic employees will highlight key milestones, decisions, and upcoming opportunities for engagement to keep the community informed, connected, and engaged.

In addition, engagement of community members, trustees and external constituents will be accomplished through existing advisory boards, meetings and councils to ensure we are receiving important feedback regarding our approach, actions and outcomes and acting in ways that are not insular but are expansive and inclusive to those we serve.

## Context and Lessons Learned from the Past

PIVOT builds on the 2024-2025 *Bridge to the Future*<sup>2</sup> initiative and lessons from prior university planning efforts. Its design reflects concerns expressed by the Faculty Senate during Year 1 of the [Bridge to the Future](#) initiative, particularly regarding transparency, engagement, and planning timelines. In response, PIVOT takes a more direct and consultative approach, placing academic quality, the employee experience, and student success at the center of decision-making (For details on how PIVOT specifically addresses faculty concerns, see Appendix I).

This framework also diverges meaningfully from the Program Review and Reduction Process (PRRP) of 2020–2021. While PRRP was reactive and focused on a limited set of departments, PIVOT is proactive, strategic, and oriented toward both short- and long-term investment and reduction across the entire academic portfolio. It emphasizes multi-year implementation, clear metrics, and sustained consultation with partners, offering greater transparency, intentional governance, and institutional alignment.

PIVOT’s success will also depend on our ability to overcome the barriers that often impede transformational change. We must be willing to take calculated risks as we revitalize academic programs, strengthen administrative structures, and experiment with new models. We must be as

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<sup>2</sup> Progress reports outlining the financial impacts of *Bridge to the Future* are available at <https://www.pdx.edu/president/bridge-future>.

inclusive as possible, recognizing that while consensus may not always be reached, all parties should have the opportunity to understand the plan, see how decisions are made, and contribute perspectives. Not all decisions will be popular, and some units will be more affected than others, but the focus must remain on what is best for PSU as a whole and on achieving the outcomes necessary to secure our future. Every issue should not be viewed as urgent and critical. Within the PIVOT framework, no decision will be taken lightly, but will be approached with an evidence-based strategic lens and as much humanity as possible.

We also acknowledge that our work is taking place against a backdrop of years of leadership turnover, which adds to the uncertainty. Change in leadership will continue as we adjust structures and reporting lines. Recognizing these realities is essential so that we can transparently identify concrete strategies to manage the psychological and human dimensions of ongoing change. This work will be challenging, and at times painful, but it is also an opportunity to restore trust and reaffirm our shared PSU identity as we create a stronger, more sustainable model for the future.

## Overview of the PIVOT Approach

PIVOT is organized into two coordinated tracks:

- **Track 1** focuses on aligning PSU's academic offerings with student demand, labor market needs, and institutional mission, while advancing student success, equity, and financial sustainability.
- **Track 2** focuses on aligning resources allocated to academic support units, centers and institutes (C/I), and administrative structures within colleges, schools, and central administrative areas. The goal is to reduce or eliminate redundancies, streamline operations, and enhance effectiveness. This review will include all support units and centers/institutes, regardless of fund type.

Each track follows a structured, evidence-informed process with shared responsibility between academic leaders and central administration. Engagement and input from faculty, staff, and other partners will be critical to shaping decisions. Both tracks are anchored in PSU's mission, designed to ensure transparency, and connected to financial modeling that links program and unit outcomes to deficit reduction and long-term resilience.

The overall approach is also guided by a **logic model (Appendix II)** that illustrates how inputs, activities, and engagement strategies will connect to measurable outcomes. This framework ensures that PIVOT remains focused on both the immediate goal of deficit reduction and the longer-term objectives of institutional vitality, sustainability, and mission alignment.

Overarching elements of the PIVOT approach include:

- **Shared responsibility:** Deans, departments, and central leadership are mutually accountable for design and outcomes, fostering trust and shared accountability.
- **Partner and constituent engagement:** Faculty, staff, and students are critical partners, and their input, feedback, and engagement will be actively sought and valued..
- **Balanced growth and reduction:** The process links deficit reduction to opportunities for strategic expansion in high-demand (growth) areas, not just contraction.
- **Holistic metrics:** Evaluations will extend beyond student credit hours to include net margin, program scale, and strategic contributions, providing a fuller picture of impact.

- **Inclusive scope:** Administrative operations and support services will be reviewed with the same transparency as academic programs, ensuring that responsibility is shared across the university.
- **State alignment:** PIVOT maximizes state funding opportunities by aligning enrollment, degree production, and student demographics with state priorities, especially in retention, completion, and high-priority fields<sup>3</sup>.

## Track 1: Academic Program Optimization

Track 1 focuses on aligning PSU's academic offerings with **student demand, labor market needs, and institutional mission** while advancing student success, equity, and financial sustainability. This process brings together two core imperatives:

1. Ensuring programs remain academically strong, accessible, and mission-driven.
2. Ensuring programs contribute appropriately to PSU's financial health and long-term viability.

The review will examine not only *what PSU teaches* (academic content and degree offerings), but also *how programs are structured and delivered*. This includes pathways, advising models, scheduling practices, and other factors that affect access, progression, and completion. The goal is to create a more responsive, inclusive, and mission-aligned academic ecosystem that meets the evolving needs of students and the region, while strengthening PSU's financial resilience.

### Track 1 Core Deliverables

- **Program Vitality Reports:** A suite of dashboards and datasets that compile vitality indicators for all academic programs. These reports will provide transparency, enable trend tracking, and serve as the primary evidence base for future planning (see [Appendices II-IV](#)) for details). Each report will integrate centrally prepared **quantitative data** with **qualitative insights from program self-studies**, ensuring that program assessments reflect both measurable outcomes and contextual factors such as disciplinary norms, accreditation requirements, and distinctive mission contributions.

Indicators within each PVR are organized into five complementary domains:

- **Student Success:** Examines how effectively programs support student achievement from entry through completion. Indicators include retention and progression rates, credit accumulation, time to degree, and graduation rates. This domain also considers equity gaps among student groups, highlighting whether programs are advancing PSU's commitment to access and success for first-generation, Pell-eligible, and historically underrepresented students.
- **Market Demand:** Assesses student and employer interest in PSU's academic offerings. Indicators include application and enrollment trends, labor market projections, employer demand in Oregon and beyond, and transfer pipeline strength. This domain evaluates whether programs are aligned with student preferences and regional workforce needs, ensuring PSU prepares graduates for meaningful careers.
- **Financial Performance:** Evaluates the fiscal contribution of programs to PSU's overall sustainability. Indicators include tuition and fee revenue, instructional and support costs, net margins, and the relationship to state funding allocations. This domain ensures that

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<sup>3</sup> Details of the Oregon Public University Student Success and Completion Funding Model are available at <https://www.oregon.gov/highered/about/postsecondary-finance-capital/pages/university-funding-model.aspx>

programs are not only academically strong but also financially viable, with the capacity to contribute to deficit reduction and reinvestment.

- **Mission Alignment:** Measures the degree to which programs align with PSU's mission, values, and strategic priorities. This includes contributions to community engagement, equity and inclusion, interdisciplinary collaboration, and alignment with the *Future in Focus* strategic plan.. It captures the value that PSU's programs bring to our community, state and region.
- **Organizational Viability:** Considers the structural and operational sustainability of programs. Indicators include program size and scale, faculty and staff capacity, administrative workload, and the ability to deliver curriculum effectively over time. This domain also examines duplication, efficiency, and opportunities for collaboration across units, ensuring programs are positioned to thrive within PSU's organizational structure.
- **Program-Specific Recommendations:** Grounded in the vitality assessment, recommendations will be developed by college and school leadership through a consultative process involving academic leaders, faculty, and staff, including the Faculty Senate Curriculum Committee where appropriate. These recommendations will summarize the program's classification (*Grow, Sustain, Revitalize, Sunset, or Start*) and outline key findings. The General Education Task Force Report is a key deliverable within this process.

Programs will be classified into one of **five categories**:

- **Grow:** Programs prioritized for expansion or additional investment.
- **Sustain:** Programs stable and aligned with current needs.
- **Revitalize:** Programs requiring redesign or restructuring.
- **Sunset:** Programs identified for phased closure.
- **Start:** New programs proposed to meet emerging opportunities.

Together, these categories provide a consistent framework for aligning programs with PSU's mission, strategic priorities, and financial sustainability (Detailed descriptions are provided in **Appendices III & IV**).

- **Program Classification Framework:** A structured guide that translates evidence across the vitality domains into descriptive program qualities for each classification category, ensuring consistency and transparency across units (**Appendix V**)
- **Financial Modeling and Projections:** For each proposed action, financial models will estimate projected cost savings, investment needs, net margin improvements, return on investment (ROI), and potential changes in state funding allocations. Models will be stress-tested with alternative enrollment and cost assumptions and include risk ratings for key projections. An aggregated portfolio-level analysis of all program actions will assess their combined contribution toward PSU's structural deficit reduction targets.

## How Track 1 Will Contribute to Budget Deficit Reduction

The Financial Modeling and Projections (bullet 4 above) will translate proposed program actions into detailed projections of how each classification contributes to PSU's structural deficit reduction targets (\$18M in FY2027 and \$17M in FY2028). The analysis will focus on five primary levers:

- **Cost Savings from Sunset Decisions:** Reductions will include instructional and administrative costs, course consolidations, elimination of underutilized supports, and implementation of required teach-out plans.

- **Faculty and Staff Adjustments:** Savings may result from retirements, voluntary separations, position reductions, contract non-renewals, vacancy management, or strategic reassignments in programs with negative margins or limited viability.
- **Increases in Net Revenue:** *Grow* and *Revitalize* programs can contribute through expanded enrollment capacity, improved retention, or stronger labor market alignment. These contributions will be estimated, but only counted toward deficit reduction once realized.
- **Cumulative Impact:** Modeling will show phased contributions toward the multi-year targets of \$18M in FY2027 and \$17M in FY2028, accounting for the timing of implementation across programs.
- **Stress Testing and Confidence Measures:** Financial models will be stress-tested against alternative assumptions, such as higher or lower enrollment recovery, varying retention improvements, and differences in realized cost savings. Each projection will be assigned a confidence rating to identify areas of greater or lesser certainty. This approach will allow leaders to distinguish between high-confidence estimates (e.g., cost savings from approved program terminations and teach-outs) and projections that are more sensitive to external conditions (e.g., enrollment growth in a specific market), supporting more risk-aware decision-making.

These fiscal projections will not be considered in isolation. Each recommendation will also be evaluated for its alignment with PSU's mission, its potential impact on state funding, and its implications for equity, ensuring that financial decisions remain integrated with academic and institutional priorities.

Finally, all fiscal impacts modeled under Track 1 will be communicated regularly with the Vice President for Finance and Administration. This coordination will ensure that program-level impacts are incorporated into PSU's broader *Bridge to the Future 2.0* plan, maintaining alignment between academic portfolio adjustments and the university's overall financial strategy.

## Track 1 Implementation Steps

Track 1 will proceed through a multi-step process during the 2025–26 academic year. Each phase will include defined milestones and structured points for engagement with faculty, deans, and central administration. Regular updates will share progress, interim findings, and decisions to keep the campus community informed and involved throughout the process. A year 1 timeline is found in **Appendix VIII**.

### ***Year 1: 2025-2026 Planning and Implementation***

#### ***Step 1: Data Preparation and Development of Preliminary Program Vitality Reports (August - September 2025)***

The Office of Research and Graduate Studies, in collaboration with the Provost's Office, Institutional Research and Planning, and Finance and Administration (FADM), will assemble and validate program-level data (e.g., enrollment, degree production, retention and completion, student credit hours, faculty workload, financial performance, and labor market evidence from Gray DI) and build into **Preliminary Program Vitality Reports**. Draft reports will be reviewed by deans, department chairs, and faculty to ensure accuracy and contextualization. Finalized reports will anchor program classification and decision-making in subsequent steps.

**Responsible parties:** *Office of Research and Graduate Studies, with support from OAA, RGS, OIRP and FADM.*

## Step 2: Complete Self-study (qualitative evidence) and Conduct Unit Consultations (October - November 2025)

Structured consultations with department chairs and faculty teams will supplement quantitative evidence with qualitative insights. These discussions will inform the **program self-studies**, which will highlight distinctive program contributions, clarify anomalies, and surface disciplinary or accreditation considerations.

Programs will be asked to respond to a set of standardized prompts aligned with the vitality domains and metrics described in [Appendix IV](#). For example, programs may be asked to:

- Provide context for enrollment, retention, and completion trends, particularly equity-related outcomes.
- Interpret labor market projections and competitor data in light of the program's disciplinary focus or regional role.
- Describe distinctive contributions, such as community partnerships, interdisciplinary collaborations, or roles in general education.
- Reflect on faculty and staff capacity, advising structures, and resilience factors that support or limit program viability.
- Identify risks or barriers not visible in the quantitative data (e.g., accreditation dependencies, upcoming retirements, specialized facilities).

Deans are responsible for ensuring that these consultations occur and that completed program self-studies are submitted to the Provost. The Provost's Office will integrate the qualitative inputs into the Program Vitality Reports, creating a more holistic review that balances measurable outcomes with program-level expertise and contextual knowledge.

The General Education Task Force Fall Symposium and subcommittee analysis will provide a parallel consultation process for PSU's general education curriculum.

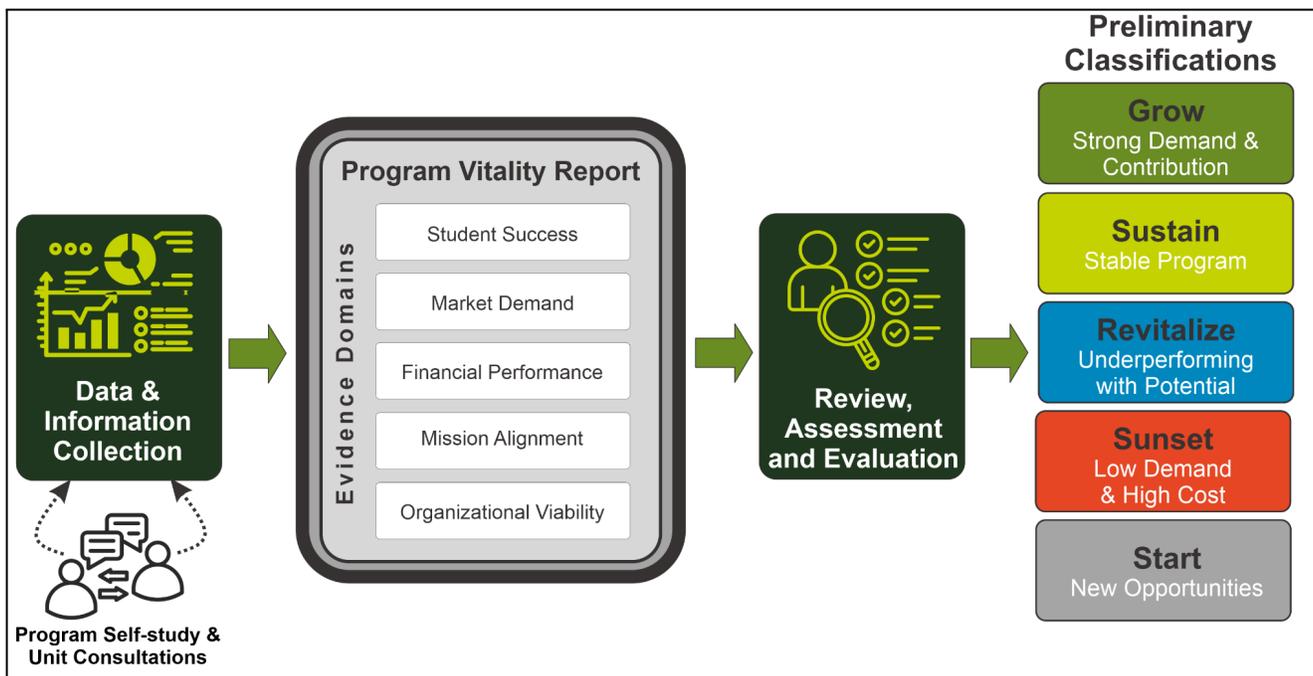
**Responsible parties:** *College and School Deans (responsible for ensuring consultations and submission of qualitative reviews), in collaboration with department chairs and faculty leaders; Provost's Office (responsible for incorporating reviews into the Program Vitality Reports)*

## Step 3: Preliminary Categorization and Feedback Loop (November - December 2025)

Using the Program Vitality Framework outlined in **Appendix III**, the Deans, in consultation with the Office of Academic Affairs (OAA) executive leadership, will develop **proposed classifications** for each program (*Grow, Sustain, Revitalize, or Sunset*), with *Start* programs reviewed separately. Draft Program Vitality Reports and proposed classifications will then be shared with units and relevant curriculum committees for clarification and feedback before categories are finalized.

The Gen Ed Task Force report, due to the Provost and President in December 2025, will include at least three implementable models taking into account PSU's current financial, curricular, pedagogical and administrative structures as well as best practices for delivering general education. This plan will be considered in conjunction with the provisional classification of University Studies (UNST) to allow a recommendation to be prepared for the Faculty Senate in January.

**Responsible parties:** *Deans, in consultation with the Office of Academic Affairs (executive leadership), with review and feedback from departments and Faculty Senate curriculum committees*



#### Step 4: Financial Modeling and Deficit Contribution Analysis (November 2025 - January 2026)

Proposed program actions will be translated into financial models estimating net revenue impact, projected savings, transitional costs, and each program's contribution toward PSU's structural deficit reduction targets. The analysis will specifically assess contributions to the \$18M reduction target for FY2027 and the \$17M target for FY2028. Stress testing and confidence measures will identify areas of high and low reliability.

**Responsible parties:** Office of Academic Affairs (OAA), in collaboration with the Budget Office and the Vice President for Finance and Administration (FADM)

#### Step 5: Finalize Classifications and Prioritized Recommendations (January 2026)

Final program and unit classifications will be confirmed by the Provost, in collaboration with the Deans' Council, using evidence from the Program Vitality Framework. Recommendations will include clear rationales for each classification, as well as **implementation timelines for programs placed in the Revitalize or Sunset categories**. Programs classified as *Grow*, *Sustain*, or *Start* will be documented with their recommended actions, but without formal implementation timelines at this stage.

The finalized classifications and recommendations will be shared with the President and the President's Executive Council for review and alignment with institutional priorities, financial sustainability, and PSU's multi-year deficit reduction plan.

**Responsible parties:** Provost (lead), in collaboration with the Deans' Council; reviewed with the President and the President's Executive Council

#### Step 6: Integration with Budget Planning and Implementation (February 2026 - ongoing)

Approved recommendations will be phased into PSU's multi-year budget, directly linked to the FY2027 (\$18M) and FY2028 (\$17M) deficit reduction targets. This step will ensure fiscal impacts from Track 1 are communicated and incorporated into the broader *Bridge to the Future* plan.

**Responsible parties:** Office of Academic Affairs (OAA) and Finance and Administration (FADM)

## Step 7: Develop Plan for Implementing Recommendations (March - May 2026)

College and school leadership, working with Human Resources, Student Services, Faculty Senate, and central administration, will develop detailed implementation plans for recommendations approved in Step 6. These plans will include:

- **Teach-out plans** for *Sunset* programs to ensure that all currently enrolled students are able to complete their degrees with minimal disruption.
- **Revitalization plans** for *Revitalize* programs, including curricular redesign, new delivery models, resource reallocation, and opportunities for interdisciplinary collaboration.
- **Resource expansion strategies** for *Grow* programs, such as increasing enrollment capacity, enhancing advising, or adding instructional staffing.
- **Monitoring of Sustain programs** to ensure continued alignment with student needs, institutional priorities, and financial sustainability.
- **Faculty and staff transition planning**, coordinated with Human Resources and in compliance with labor agreements, to ensure transparency and support for affected employees.
- **Equity impact assessments** to monitor effects of PIVOT, ensuring that decisions align with PSU's values of access and inclusion..

**Responsible parties:** *Provost's Office (lead), with support from Deans, Human Resources, Finance and Administration, and Student Services*

### **Year 2: 2026-2027: Continued Implementation and Transition Management**

Year 2 will be shaped by the classifications and recommendations finalized in Year 1. This phase will emphasize continued implementation, monitoring, and adjustment as programs move through revitalization, sunset, or expansion processes. Because conditions will evolve, Year 2 will require ongoing collaboration across colleges, schools, and central administration to sustain progress.

A critical focus will be the **regular updating of financial projections** to ensure that PSU remains on track to meet the structural deficit reduction targets. As program actions unfold, projected savings and revenue gains will need to be recalibrated based on actual outcomes. This iterative process will allow PSU to identify gaps, make mid-course corrections, and adjust implementation timelines where necessary.

To guide this work, an **Implementation Steering Group (ISG)** will be convened by the Provost's Office. The ISG will be a **cross-campus body** with broad representation, including:

- Academic leadership (deans, associate deans and/or department chairs)
- Faculty Senate Budget Committee representative
- Center and institute directors
- Professional staff from academic and administrative units
- Representatives from Student Services and Student Affairs
- Finance and Administration and Human Resources staff
- One to two student representatives

The ISG's role will be to:

- Monitor the progress of implementation across colleges and units.
- Ensure that fiscal impacts are accurately tracked and reported.

- Recommend adjustments in response to shifting financial, academic, or organizational conditions.
- Surface issues related to equity, student experience, employee experience and workforce impacts that require leadership attention.

Year 2 will also require attention to the **human and organizational aspects of change**, including continued communication with faculty, staff, and students, as well as monitoring the equity and mission impacts of decisions. Transparent reporting to campus and community constituents and to the President's Executive Council will be essential for maintaining trust and momentum.

**Responsible parties:** *Implementation Steering Group (convened by the Provost's Office), in collaboration with Deans, Human Resources, FADM, and Student Services*

### **Years 3-5: Future Steps**

As plans are developed, a more detailed timeline for actions that follow Years 1 & 2 will be created.

## **Track 2: Assessment of Academic Support Units, Centers/ Institutes, and Administrative Structures**

As part of PSU's broader effort to align resources with institutional priorities and reduce or eliminate redundancies, this track will enable a comprehensive review of academic support units, centers/institutes (C/I), and administrative structures housed within colleges, schools, and central administrative areas. This includes all support units and centers/institutes, regardless of fund type.

These entities are essential to PSU's academic excellence, research productivity, student services, and public mission, but they vary significantly in organizational models, staffing structures, funding sources, and programmatic contributions. The assessment will evaluate each unit's **core functions, service outputs, staffing levels, and alignment with PSU's strategic imperatives**, with particular attention to how efficiencies can be achieved by eliminating redundancies and addressing gaps.

This includes a targeted review of administrative structures and staffing at the school, college, and institutional level to identify inefficiencies, overlapping responsibilities, and opportunities for resource sharing or reorganization. The aim is to ensure that administrative roles and workloads are aligned with programmatic needs and fiscal constraints, and that leadership models support coordinated and effective service delivery.

The process will incorporate both **quantitative and qualitative evidence** to distinguish areas of high impact and sustainability from those requiring **reorganization, streamlining, or reinvestment**. As with Track 1, the goal is not across-the-board reductions, but a careful strengthening of essential services and operations while ensuring fiscal responsibility.

Ultimately, Track 2 will clarify how each unit and administrative structure contributes to institutional priorities and success, identify opportunities for improvement or redesign, and ensure that financial resources are aligned with PSU's most urgent needs and highest-impact strategies. This process will be guided by a Logic Model (**Appendix II**) that links inputs and activities to measurable outcomes and institutional goals.

### **Track 2 Core Deliverables**

Track 2 will produce a set of deliverables that integrate findings from centers/institutes, academic support units, and administrative structures into PSU's institutional and financial planning.

- **Unit Vitality Profiles:** A centrally compiled report for each unit that integrates:

- **Financial and Operational Data Sets:** standardized templates prepared centrally, including budgets, staffing structures, service utilization, and peer/internal benchmarks.
- **Structured Unit Responses:** concise, domain-based reflections from unit leaders, developed with staff and partner consultation, highlighting contributions, contextual factors, and strategies for improvement.

Together, these elements ensure each profile reflects both quantitative evidence and qualitative context. As in Track 1, these profiles will serve as the primary evidence base for planning decisions, ensuring that classifications and recommendations are grounded in both standardized data and contextual insights.

Qualitative and quantitative inputs will be organized around the four evaluation domains (see **Appendix VI** for further details on evaluation metrics and consultations):

- **Mission Alignment and Strategic Contribution:** How each unit's services advance PSU's strategic priorities in student success, equity, research, and community impact. Emphasizes coherence with institutional goals and the ability to demonstrate measurable outcomes.
- **Financial and Operational Sustainability:** The stability and efficiency of funding models (general funds, external revenue, expenditures), including cost-effectiveness, proportionality of investment to outcomes, and identification of redundancies. Determines long-term viability.
- **Service Profile and Utilization:** Scope and focus of services, target populations (students, faculty, staff), service volume and frequency, and contributions to learning, scholarship, and visibility through programming, applied learning, or engagement.
- **Organizational Design and Efficiency:** leadership structures, administrative staffing models, and unit organization for effectiveness, role clarity, and alignment with institutional priorities. Includes review of school/college-level administrative structures to identify opportunities for resource sharing, reduced redundancy, and redesign.
- **Unit-Specific Recommendations:** Concise memos prepared by deans, vice presidents, or unit leaders, in consultation with faculty and staff. Each memo will summarize findings, assign a classification, and identify recommended actions.
- **Classification Framework for Units (see Appendix VII):** A structured guide that translates evidence from the four domains into five categories:
  - **Invest:** Strong alignment and impact; requires added resources to scale.
  - **Sustain:** Operating effectively; maintained with routine monitoring.
  - **Reassess:** Potential exists, but inconsistent or unclear contributions.
  - **Restructure/Consolidate:** Requires redesign or integration for efficiency.
  - **Phase Out:** Persistent misalignment or unsustainability; closure recommended.

These classifications will be applied consistently across units, guided by the evidence in the Unit Vitality Profiles and the recommendations of deans, vice presidents, and unit leaders.

- **Financial and Structural Modeling:** Analyses estimating cost savings, efficiency gains, investment needs, and ROI from proposed actions. Models will be stress-tested against alternative assumptions (e.g., pace of consolidation, staffing transitions, or revenue growth), and assigned confidence ratings to distinguish high-certainty savings from more variable

projections. Models will be integrated with the Integrated Planning of Enrollment and Budget (IPEB) process, and a consolidated analysis will summarize cumulative impacts on PSU's financial sustainability, service quality, and organizational efficiency.

## How Track 2 Will Contribute to Budget Deficit Reduction

The evaluation of academic support units, centers/institutes, and administrative structures will identify effectiveness and strategic alignment while also quantifying potential cost savings, opportunities for reinvestment, areas requiring structural change, and potential staff reassignments or reductions. To guide these decisions, each unit will be classified into one of five categories (Invest, Sustain, Reassess, Restructure/Consolidate, or Phase Out; see **Appendix V**).

The financial and structural modeling associated with these classifications will translate proposed unit actions into projections of how Track 2 contributes to PSU's deficit reduction targets. The analysis will focus on the following primary levers:

- **Cost Savings from Consolidation or Phase-Out:** Reductions will result from eliminating duplicative services, merging overlapping functions, phasing out low-impact units, and streamlining administrative structures.
- **Staffing Adjustments:** Savings may be achieved through retirements, voluntary separations, vacancy management, position reductions, or strategic staff reassignments to higher-need areas.
- **Efficiency Gains:** Restructuring or shared service models may reduce administrative overhead, leverage economies of scale, and allow redeployment of resources to higher-impact priorities.
- **Targeted Reinvestment:** Units classified as Invest will receive support to expand high-value services, scale external revenue, or strengthen PSU's research and community impact, with contributions to deficit reduction counted only once realized.
- **Cumulative Impact and Phasing:** Financial modeling will show phased contributions toward the \$18M (FY2027) and \$17M (FY2028) targets, accounting for timing of implementation, staffing transitions, and service continuity.
- **Stress Testing and Confidence Measures:** Models will be stress-tested against alternative assumptions (e.g., pace of staff transitions, realized savings from consolidation, growth in external revenue). Projections will be assigned confidence ratings to distinguish between high-certainty savings (e.g., confirmed staff reductions) and more variable projections (e.g., efficiency gains dependent on behavioral change), supporting risk-aware decision-making.

These projections will be communicated regularly with the Vice President for Finance and Administration to ensure Track 2 outcomes are fully integrated into the broader Bridge to the Future plan.

As with Track 1, these fiscal projections will not be considered in isolation. Each recommendation will also be evaluated for its alignment with PSU's mission, the quality of services provided to students and faculty, and equity implications, ensuring that financial decisions remain integrated with institutional priorities.

## Track 2 Steps

Track 2 will proceed through a multi-step process during the 2025–26 academic year. Each phase will include defined milestones and structured points for engagement with unit leaders, vice presidents,

deans, and central administration. Regular updates will share progress, interim findings, and decisions to keep the campus community informed and involved throughout the process. A year 1 timeline is found in **Appendix VIII**.

## **Year 1: 2025-2026 Planning and Implementation**

### **Step 1: Data Preparation and Development of Unit Vitality Profiles (August - October 2025)**

Centrally prepared financial and operational data (budgets, staffing, utilization) will be compiled by Finance and Administration (FADM) and Institutional Research and Planning (OIRP), in collaboration with OAA and RGS. Draft Unit Vitality Profiles, combining these datasets with structural templates, will be created to provide a consistent and comparable evidence base across all units. Draft profiles will be reviewed with vice presidents, deans, and unit leaders to ensure accuracy and contextualization.

**Responsible Parties:** *FADM, OIRP, OAA, RGS, with review by unit leaders.*

### **Step 2: Unit Self-Assessment and Partner/Constituent Input (September - November 2025)**

Unit leaders, with staff and partner input, will provide concise, domain-based responses to contextualize data, highlight distinctive contributions, and identify challenges or inefficiencies. These will be incorporated into the Unit Vitality Profiles.

**Responsible Parties:** *Unit leaders (vice presidents, deans, directors), with oversight by OAA and FADM.*

### **Step 3: Preliminary Classification and Synthesis (November - December 2026)**

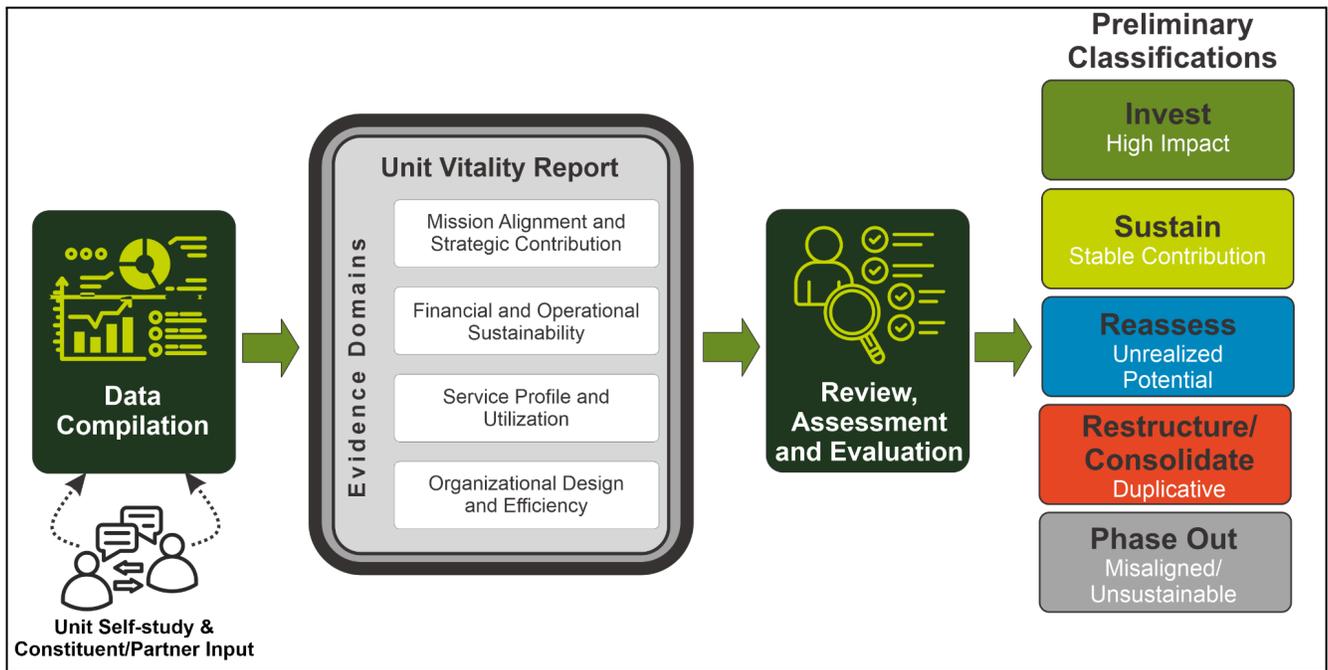
A core review team, consisting of leaders and representatives from OAA, RGS, and FADM, will synthesize data from the Unit Vitality Profiles, structured unit responses, and consultation feedback to develop preliminary classifications across the five categories (Invest, Sustain, Reassess, Restructure/Consolidate, Phase Out). Draft classifications and recommendations will then be shared with unit leaders for verification, additional contextual input, and feedback prior to finalization.

**Responsible Parties:** *Core review team (OAA, RGS, FADM representatives), with review and feedback from unit leaders.*

### **Step 4: Refinement and Integration with Financial Planning (December 2025 - ongoing)**

Refined classifications will be paired with financial assessments estimating savings, investment needs, and risks. Findings will be integrated into PSU's multi-year financial and organizational modeling under PIVOT, in coordination with Track 1 program assessments. Targeted consultations will be held on restructuring opportunities, shared services, the operational efficiencies initiative and leadership configurations.

**Responsible Parties:** *Core Review Team, OAA VP of Academic Budget and Planning in collaboration with FADM*



### Step 5: Final Report and Communication of Outcomes (January 2026)

Final classifications and recommended actions will be confirmed, accompanied by rationales and preliminary implementation timelines. Recommendations will be reviewed with the President and President’s Executive Council to ensure alignment with institutional priorities.

**Responsible Parties:** Provost and OAA/RGS leadership, in collaboration with FADM, reviewed with the President’s Executive Council.

### Step 6: Integration with Budget Planning (February 2026 – ongoing)

Approved recommendations will be integrated into PSU’s budget planning process, linked to the \$18M (FY2027) and \$17M (FY2028) deficit reduction targets.

**Responsible Parties:** OAA and FADM.

### Step 7: Develop Implementation Plans (February - May 2026)

Detailed implementation plans will be developed for units designated as *Reassess*, *Restructure/Consolidate*, or *Phase Out*. Plans will include staff transition strategies, reorganization timelines, and reinvestment priorities.

**Responsible Parties:** Unit leaders in consultation with OAA Executive Leadership and RGS, with support from Human Resources and affected units.

### Year 2: 2026–2027 Continued Implementation and Transition Management

Implementation steps will depend on recommendations finalized in Year 1. An implementation steering group will oversee transition planning, monitor progress, and provide regular updates to leadership. Ongoing financial projections will be updated to ensure PSU remains on track to meet structural deficit targets.

## **Years 3–5: Future Steps**

As implementation unfolds, further timelines will be developed for multi-year actions such as large-scale reorganizations, long-term efficiency initiatives, or investments in strategic service expansions.

## **Coordination and Collaboration Across Track 1 and Track 2**

Because of the overlapping and integrative services that are woven into the academic and administrative structures, policies and processes that support students both within OAA and across campus, coordination and collaboration is essential. This section outlines key elements of how that coordination and collaboration will take place throughout the implementation of PIVOT.

- **Early Design and Framework Development (Summer/Fall 2025)**
  - **Track 1:** Deans, department chairs, and Faculty Senate leadership consulted on and/or provided input about the domains and metrics for Program Vitality Reports.
  - **Track 2:** Deans, unit leaders, and Faculty Senate leadership consulted on and/or provided input about the domains for Unit Vitality Profiles and the framework for unit classification.
- **Data Preparation and Review (Fall 2025)**
  - **Track 1:** Draft Program Vitality Reports, prepared centrally, are reviewed with deans, chairs, faculty, and relevant Senate committees to validate enrollment, degree, financial, and labor market data.
  - **Track 2:** Draft Unit Vitality Profiles, prepared centrally, integrate financial/operational data sets with structured unit responses. Draft profiles are reviewed with vice presidents, deans, unit leaders, and governance bodies to ensure accuracy and contextualization.
- **Interpretation and Classification (Winter 2026)**
  - **Track 1:** Program self-studies and college-level consultations, with Faculty Senate involvement as appropriate, contextualize classifications before recommendations are finalized.
  - **Track 2:** Structured unit responses and consultation feedback are synthesized by the core review team (OAA, RGS, FADM). Draft classifications are shared with unit leaders, deans, and governance bodies for feedback prior to finalization.
- **Decision-Making and Implementation (Spring 2026 and beyond)**
  - **Track 1:** Final classifications and prioritized recommendations are confirmed by the Provost in collaboration with the Deans' Council and reviewed by the President and the President's Executive Council.
  - **Track 2:** Final classifications and recommendations, informed by Unit Vitality Profiles and structured unit responses, are reviewed by the President and the President's Executive Council. Approved recommendations are then integrated into PSU's financial plan through collaboration with the Vice President for Finance and Administration.

## Conclusion

The implementation of Portland State University's Office of Academic Affairs (OAA) and Research & Graduate Studies (RGS) **Plan for Institutional Vitality and Organizational Transformation (PIVOT)** is designed to contribute to the projected PSU \$35 million structural deficit as part of a larger institutional strategy to restore PSU's financial health. It also builds upon and integrates into PSU's **Bridge to the Future** Initiative by providing details on how financial goals will be achieved with respect to OAA and RGS programs and operations.

In this report, PIVOT goals have been outlined along with important guiding principles, modes of engagement and communication, and lessons learned from the past that inform the PIVOT initiative. The two-track PIVOT approach has been described along with core deliverables, how they will contribute to budget deficit reduction, and major implementation steps and timelines. Details of the approach have also been included in Appendices

We acknowledge that this is an extremely challenging and difficult time and there will be many questions, concerns, and fears as we strive to meet our transformational change goals. We also know that together we are stronger, and it is that strength of commitment to our mission, our students and each other that will help us navigate the uncertain terrain ahead. This is our opportunity to collectively imagine and build a university for the future. Our students are depending on us.

## Appendix I: How PIVOT Addresses Faculty Senate Concerns Regarding the Bridge to the Future Plan

The following information will be reframed for relevant constituent groups as part of a comprehensive communication strategy.

### 1. Concern: Lack of Transparency in Decision-Making

- **Senate Resolution Concern:** *Decisions were made without adequate explanation, data-sharing, or shared governance, leaving faculty without a clear understanding of methodology or rationale.*
- **PIVOT Approach:** PIVOT introduces a **transparent and consistent framework** with well-documented, multi-dimensional evaluation domains: student success, financials, market fit, mission alignment, and program viability. Chairs and college/school leaders will be actively involved in:
  - Framework design and metric development,
  - Review and interpretation stages, and
  - Decision-making that is grounded in evidence and shared tools.

The inclusion of visual dashboards, rubrics, and the ability for departments to contribute contextual commentary ensures a participatory and clear process.

### 2. Concern: Overreliance on Financial Metrics

- **Senate Resolution Concern:** *The plan was perceived to prioritize financial cuts above academic mission or student needs.*
- **PIVOT Approach:** While cost control remains essential, PIVOT integrates mission alignment, equity goals, and regional impact into the program review process as weighted components, ensuring the plan is not just cost-driven but strategically balanced.

### 3. Concern: No Distinction Between Academic and Administrative Cuts

- **Senate Resolution Concern:** *Faculty noted that academic programs were bearing a disproportionate share of the burden.*
- **PIVOT Approach:** We recognize the concern that academic programs have historically carried a greater share of reductions. Under *Bridge to the Future II*, PSU committed to reviewing **all aspects of the university**, including academic, administrative, and support units, to ensure that deficit reduction is shared across divisions. PIVOT builds on this commitment by applying **consistent standards of review** to both academic and non-academic units.

At the same time, PIVOT emphasizes that reductions will not be across-the-board, but **strategic**, reflecting unit performance, mission alignment, and contribution to PSU's financial health. We understand the skepticism that exists, and we are committed to working with our colleagues both within and outside of our academic areas, to demonstrate through process and outcomes that shared responsibility and thoughtful prioritization are guiding principles of this work.

### 4. Concern: Absence of Academic Values and Mission

- **Senate Resolution Concern:** *The Bridge to the Future plan failed to reflect PSU's public mission and academic commitments.*

- **PIVOT Approach:** Mission alignment is central to the PIVOT framework. Programs are evaluated for contributions to:
  - Equity and diversity (e.g., Pell-eligible student success),
  - Regional economic development,
  - Interdisciplinary work,
  - Public impact, and
  - Alignment with the *Future in Focus* strategic plan and the *RGS Roadmap to 2030*.

The classification model also avoids simplistic “cut lists” by including categories such as **Revitalize**, which encourages support for programs with promise but current underperformance.

### **5. Concern: No Timeline or Accountability**

- **Senate Resolution Concern:** *There were no specific goals, accountability structures, or realization timelines in the Bridge to the Future plan.*
- **PIVOT Approach:** The PIVOT embeds **24-month fiscal realization targets** tied to each intervention, complete with:
  - Regular checkpoints,
  - ROI expectations, and
  - Escalation protocols if goals are not met.
- A final deliverable includes a dynamic program portfolio dashboard, updated annually, ensuring ongoing accountability and adjustment as needed.

### **6. Concern: Faculty Exclusion from Planning**

- **Senate Resolution Concern:** *Faculty had minimal input and participation in shaping the process.*
- **PIVOT Approach:** PIVOT explicitly incorporates faculty involvement at all stages of the process. Faculty will be engaged through:
  - **Consultative input on evidence and metrics**, working with deans and Institutional Research to ensure that data are accurate, contextualized, and meaningful.
  - **Participation in review and interpretation phases**, where department chairs, program directors, and faculty teams will provide qualitative insights to supplement quantitative indicators.
  - **Governance steps** that honor Faculty Senate’s determinative authority in areas such as curriculum, degree requirements, and program creation or elimination, while also drawing on faculty expertise in consultative areas such as budget and organizational design.
  - **Structured opportunities for dialogue and feedback**, including campus forums, unit-level consultations, and the use of the *Program Vitality Reports* as shared tools for decision-making.

Through these mechanisms, faculty will both review data and **shape the interpretations, recommendations, and outcomes** that follow. PIVOT is designed to ensure that faculty perspectives are not an afterthought, but a **core component of a transparent and collaborative process**.

### **7. Concern: One-Size-Fits-All Framework**

- **Senate Resolution Concern:** *The previous framework failed to accommodate differences in disciplines, modalities, and levels (e.g., graduate vs. undergraduate).*
- **PIVOT Approach:** The PIVOT includes graduate-specific metrics, differentiated labor market analytics, and modality-sensitive evaluation (e.g., full-time vs. part-time grad programs, time-to-degree norms, licensure outcomes). The framework is adaptable, not prescriptive, with the ability to factor in **qualitative inputs and contextual information**.

PIVOT directly responds to concerns raised by the Faculty Senate about the earlier *Bridge to the Future* initiative. While the Board of Trustees and University administration may not share all aspects of the Senate's critique, the new plan takes seriously the call for greater transparency, balanced decision-making, and inclusive planning. It aims to integrate financial responsibility with academic integrity, shared governance, and long-term strategic vision, operationalizing sustainability in a way that reflects PSU's mission and values.

## Appendix II: Logic Model Approach to Impact, Cost Control, and Sustainability

The deliverables above anchor a logic model framework that connects inputs → outputs → short-term outcomes → long-term impact and keeps PIVOT aligned with PSU’s strategic objectives and the university’s commitment to addressing the deficit.

Category	Description
<b>Inputs</b>	<ul style="list-style-type: none"> <li>● <b>Comprehensive data collection:</b> Academic program data (enrollment, degree production, student credit hours, retention/completion, labor market demand) and unit-level data (financials, staffing structures, service utilization).</li> <li>● <b>Qualitative self-assessments:</b> Program vitality narratives (Track 1) and unit reflections (Track 2) capturing context, contributions to strategic priorities, and future opportunities.</li> <li>● <b>Constituent engagement:</b> Input from deans, faculty, staff, and shared governance bodies; validation and contextualization of data.</li> <li>● <b>External expertise and benchmarking:</b> Partnership with Gray DI (Track 1) and national benchmarks for staffing and administrative structures (Track 2).</li> <li>● <b>Integration with institutional planning:</b> Alignment with PSU’s strategic plan, financial modeling, and PIVOT’s overarching deficit reduction targets.</li> </ul>
<b>Outputs</b>	<ul style="list-style-type: none"> <li>● <b>Program vitality reports (Track 1):</b> Standardized reports integrating quantitative and qualitative evidence for every academic program.</li> <li>● <b>Unit and institute assessments (Track 2):</b> Self-assessments and evaluative reports for centers, academic support units, and administrative structures.</li> <li>● <b>Classification frameworks:</b> <ul style="list-style-type: none"> <li>○ <i>Track 1:</i> <b>Academic Program Classification Framework</b> translating vitality domains into categories (Grow, Sustain, Revitalize, Sunset, or Start).</li> <li>○ <i>Track 2:</i> <b>Unit Classification Framework</b> applying evaluation domains to assign units and structures to Invest, Sustain, Reassess, Restructure/Consolidate, or Phase Out.</li> </ul> </li> <li>● <b>Financial modeling tools:</b> Cost savings estimates, reinvestment opportunities, risk projections, and stress tests tied to classification outcomes.</li> <li>● <b>Integrated recommendations:</b> Portfolio- and unit-level recommendations linking academic and administrative findings directly to PSU’s budget planning.</li> </ul>
<b>Short-term Outcomes</b>	<ul style="list-style-type: none"> <li>● <b>Identification of cost savings and efficiencies:</b> Specific dollar targets quantified across both Tracks 1 and 2.</li> <li>● <b>Alignment of services and programs:</b> Early actions taken to improve mission alignment, eliminate redundancies, and right-size services.</li> <li>● <b>Transparent communication and engagement:</b> Clear frameworks for sharing classifications and financial implications with campus partners.</li> <li>● <b>Foundation for deficit reduction:</b> Measurable first contributions toward narrowing PSU’s structural deficit.</li> </ul>

Category	Description
<p><b>Long-term Impacts</b></p>	<ul style="list-style-type: none"> <li>● <b>Balanced institutional budget:</b> Structural deficit eliminated within two years (FY2028).</li> <li>● <b>Sustainable financial and operational model:</b> Systems in place for ongoing monitoring, ensuring long-term fiscal health and resilience.</li> <li>● <b>Reallocation to mission priorities:</b> Freed resources reinvested in student success, equity, research, and community impact.</li> <li>● <b>Strengthened student success outcomes:</b> Enhanced retention, completion, and career readiness through better-aligned academic programs and support structures.</li> <li>● <b>Strengthened institutional capacity:</b> Academic programs, support units, and administrative structures functioning at scale, aligned with PSU’s mission and strategy.</li> <li>● <b>Culture of accountability and continuous improvement:</b> Regular cycles of assessment, classification, and financial planning embedded in institutional practice.</li> </ul>

## Appendix III. The Program Vitality Report

The **Program Vitality Report (PVR)** is a central tool of PIVOT, designed to provide a transparent and evidence-informed foundation for academic program review and decision-making. It compiles a consistent set of indicators across all programs, enabling deans, faculty, and central leadership to assess academic strength, student outcomes, financial performance, and mission alignment in a holistic way.

The PVR is not a ranking system or a final verdict. Instead, it is a **decision-support tool** that highlights areas of strength, identifies opportunities for revitalization, and flags programs that may require restructuring or sunset. By integrating **quantitative indicators with qualitative insights from faculty and deans**, the PVR ensures that decisions are shaped by both data and disciplinary expertise.

Indicators within each PVR are organized into five domains:

- **Student Success:** Retention, progression, persistence, and graduation outcomes, including equity gaps.
- **Market Demand:** Student interest and workforce relevance, including application and enrollment trends, transfer pipelines, and labor market projections.
- **Financial Performance:** Revenues, instructional costs, net margins, and contributions to PSU's overall financial sustainability.
- **Mission Alignment:** Contributions to PSU's mission, values, and strategic priorities, including equity, access, community engagement, and alignment with the *Bridge to the Future* and *Future in Focus* plans.
- **Organizational Viability:** Program size and scale, faculty and staff capacity, administrative workload, and the ability of a program to operate effectively and sustainably.

All Program Vitality Reports will be compiled centrally by OAA and RGS, using standardized institutional data sets and, where appropriate, incorporating external sources such as the **Gray DI Program Dashboard and Profile**. Programs will not be asked to prepare quantitative data independently. Instead, the centrally generated reports will provide consistent and comparable evidence across all units.

Each report will be displayed on a **unified dashboard** that combines **quantitative indicators** with **qualitative input** from program self-studies, creating a single point of reference for program assessment. Programs will be invited to add context by explaining anomalies, highlighting distinctive contributions, and situating the data within disciplinary or accreditation expectations.

While the underlying data are standardized, the relevance of specific metrics will vary by program. For this reason, program vitality assessments require interpretation by faculty, deans, and central leadership to ensure that decisions are fair, contextually accurate, and aligned with PSU's mission.

**Note:** *The assessment of academic programs under Track 1 will occur in parallel with PSU's review of the General Education curriculum, currently led by the **General Education Task Force**. While Track 1 focuses on degree programs (majors, minors, certificates, and graduate programs), the General Education review will examine the structure, requirements, and delivery of PSU's foundational curriculum. This work will likely have implications for the general education teaching model and the role of the faculty and departments of the Schools and Colleges in delivering the curriculum.*

*The General Education Task Force, charged with reviewing national models, conducting a self-study, and developing reform proposals, will share draft models with the campus community in Fall 2025, with*

*recommendations expected in December 2025. Outcomes from this process will be integrated with Track 1 programmatic reviews, ensuring that decisions about PSU's overall academic portfolio account for both disciplinary programs and the evolving general education model.*

## **From Vitality Reports to Program Classifications**

The PVRs will be the foundation for classifying programs into one of five categories: *Grow, Sustain, Revitalize, Sunset, or Start*. These classifications provide a structured way to connect program-level evidence with strategic decisions about investment, redesign, or phase-out.

While the reports present standardized indicators across five domains, the interpretation of those metrics may vary by program. Classifications will therefore be determined by **OAA executive leadership**, in consultation with deans, faculty, and governance bodies, using both the data and the contextual insights provided during the review process.

The categories are defined as follows:

- **Grow:** Programs that demonstrate strong student success, clear market demand, financial viability, and alignment with PSU's mission. These programs will be prioritized for expansion, additional investment, or scaling to meet demand.
- **Sustain:** Programs that are academically and financially stable, mission-aligned, and meeting current needs. These programs will continue at their current scale with modest adjustments as necessary to maintain quality and effectiveness.
- **Revitalize:** Programs that are mission-aligned and show potential but require significant redesign or restructuring. Revitalization may include curriculum revisions, alternative delivery models, stronger career pathways, or resource reallocation to improve demand, student success, or financial performance.
- **Sunset:** Programs that no longer demonstrate sufficient student demand, financial viability, or mission, and where revitalization is not feasible. These programs will be phased out through a planned teach-out process that supports currently enrolled students, while faculty and staff transitions will be managed in consultation with Human Resources and in alignment with labor agreements.
- **Start:** New programs proposed to meet emerging student interests, labor market needs, or strategic opportunities. Proposals must demonstrate demand, financial viability, and alignment with PSU's mission before launch.

These classifications are not permanent labels but **strategic categories** that will be revisited as conditions change, ensuring PSU's academic portfolio remains relevant, mission-driven and financially sustainable.

## Appendix IV: Metrics for Program Vitality Domains (Track 1)

The following metrics were identified through a combination of **institutional analysis, external benchmarking, and faculty and staff input**. A key step in this process was the **September 2025 PIVOT data workshop**, where participants reviewed potential indicators and identified those most important, relevant, and meaningful for assessing program vitality. Metrics marked with a ✓ in the tables reflect those workshop priorities.

In building this framework, efforts were made to:

- **Align metrics with the five vitality domains** (Student Success, Market Demand, Financial Performance, Mission Alignment, and Organizational Viability).
- **Identify clear sources** for each metric, including institutional research (OIRP), Gray DI data, Finance and Administration (FADM), the Office of Academic Affairs (OAA), and program self-assessments.
- **Balance quantitative and qualitative evidence**, ensuring that standardized data can be supplemented with faculty and program-level context.

Together, these metrics provide the **core evidence base** for Program Vitality Reports, while leaving room for interpretation and contextualization at the program level.

### Student Success Metrics

Metric	Source	Quantitative / Qualitative	Workshop Priority
<b>Program Size &amp; Enrollment Trends</b>			
Current Enrollment	OIRP / Gray DI	Quantitative	✓
Absolute Change from Previous Year	OIRP / Gray DI	Quantitative	
Percent Change from Previous Year	OIRP / Gray DI	Quantitative	
5-Year Enrollment Trend	OIRP / Gray DI	Quantitative	✓
<b>Student Progress &amp; Retention</b>			
Students Enrolled in 2+ Terms	OIRP	Quantitative	✓
Retention Rates (1-year, multi-year)	OIRP	Quantitative	✓
Course DFW Rates	OIRP / Gray DI	Quantitative	✓
Program Withdrawal / Dropout Rate	OIRP / Gray DI	Quantitative	
Percent of Credit Hours Taught by Full-Time Faculty	OIRP / Gray DI	Quantitative	
<b>Completion &amp; Outcomes</b>			
Completions (annual)	OIRP / Gray DI	Quantitative	✓
Absolute Change (YoY) in Completions	OIRP / Gray DI	Quantitative	
Percent Change (YoY) in Completions	OIRP / Gray DI	Quantitative	
5-Year Completions Trend	OIRP	Quantitative	✓
Median Years to Complete	OIRP / Gray DI	Quantitative	✓
Predicted vs. Actual Completions	Gray DI	Quantitative	✓
Median Earnings 2-Years Post-Graduation	Gray DI	Quantitative	✓

Metric	Source	Quantitative / Qualitative	Workshop Priority
Job Placement / Employment Outcomes	Gray DI	Quantitative	✓
<b>Equity Outcomes</b>			
Enrollment by Demographics (race/ethnicity, gender, Pell status, first-gen)	OIRP / Gray DI	Quantitative	✓
Retention and Completion by Subgroup	OIRP	Quantitative	✓
<b>Qualitative &amp; Program-Reported</b>			
Program Innovations in Student Success (mentoring, tutoring, supports)	Program Self-Assessment	Qualitative	
Barriers Identified by Faculty/Students	Program Self-Assessment	Qualitative	
Accreditation or Licensure Requirements and Outcomes (where relevant)	OAA / Program Self-Assessment	Mixed	

### Market Demand Metrics

Metric	Source	Quantitative / Qualitative	Workshop Priority
<b>Applications &amp; Enrollment Trends</b>			
Applications (5-year trend)	OIRP	Quantitative	✓
Admits (5-year trend)	OIRP	Quantitative	✓
Enrollments (5-year trend)	OIRP	Quantitative	✓
Yield (%) (Enrollments ÷ Admits)	OIRP	Quantitative	✓
Student demand percentile (relative to other PSU programs)	Gray DI	Quantitative	✓
<b>Transfer Pipelines</b>			
Number of transfer students (program-level)	OIRP / Gray DI	Quantitative	✓
% Incoming Transfers (percentage of new students who enter as transfers)	OIRP / Gray DI	Quantitative	✓
<b>Labor Market Demand &amp; Employment</b>			
Regional labor market demand (job postings by CIP-related occupations and Percentile)	Gray DI	Quantitative	✓
National labor market demand (job postings by CIP-related occupations and Percentile)	Gray DI	Quantitative	✓
Job Postings per Graduate (and Percentile)	Gray DI	Quantitative	✓
Underemployment (Percentage and Percentile)	Gray DI	Quantitative	✓
Median wages (regional and national) for related occupations	Gray DI	Quantitative	✓
<b>Competitor Intensity</b>			
Competitor program count within 125-mile radius	Gray DI	Quantitative	✓
Median Program Completions (in market)	Gray DI	Quantitative	

Metric	Source	Quantitative / Qualitative	Workshop Priority
YoY Median Program Compl Change (%)	Gray DI	Quantitative	
<b>Qualitative Inputs</b>			
Employer and community partner feedback on workforce relevance	Program Self-Assessment	Qualitative	✓
Student interest surveys and admissions inquiries	OIRP / Student Affairs / Enrollment Management	Qualitative	

### **Financial Performance Metrics**

Metric	Source	Quantitative / Qualitative	Workshop Priority
<b>Core Economics (SCH &amp; Dollars)</b>			
Student Credit Hours (SCH)	Gray DI	Quantitative	✓
Instructional cost per SCH	Gray DI	Quantitative	✓
Total contribution (net of costs)	Gray DI	Quantitative	✓
Contribution / Net Revenue (dollar value)	Gray DI	Quantitative	✓
Contribution as % of Net Revenue	Gray DI	Quantitative	✓
<b>Break-Even &amp; Thresholds</b>			
Break-even enrollment threshold (number of students or SCH needed to cover instructional costs)	Gray DI	Quantitative	✓
Contribution margin minimums (benchmark threshold for program viability)	OIRP / Gray DI	Quantitative	
<b>Faculty Cost Structure</b>			
Release cost by department faculty	Gray DI	Quantitative	
Full-time instructional cost	Gray DI	Quantitative	✓
Adjunct instructional cost	Gray DI	Quantitative	✓
Ratio of full-time to total instructional costs	Gray DI	Quantitative	✓
Adjunct vs. full-time instructional ratio (SCH basis)	Gray DI	Quantitative	
<b>Cost &amp; Efficiency Trends</b>			
Multi-year instructional cost trends (3–5 year)	Gray DI	Quantitative	✓
Section size / seat utilization rates	OIRP	Quantitative	✓
<b>Discounting &amp; Affordability</b>			
Discount rate (%)	Gray DI	Quantitative	

Metric	Source	Quantitative / Qualitative	Workshop Priority
<b>Qualitative Inputs</b>			
Faculty workload context (release time, reassigned duties)	Program self-assessment	Qualitative	
Notes on special funding or unique revenue streams	Program self-assessment	Qualitative	

### **Mission Alignment Metrics**

Metric	Source	Quantitative / Qualitative	Workshop Priority
<b>Core Academic Role</b>			
Contribution (SCH) to general education (UNST participation, # of courses, SCH delivered)	OIRP / OAA	Quantitative	✓
Service to non-majors (SCH taught outside home program)	OIRP	Quantitative	✓
<b>Alignment with PSU Strategic Priorities (Future in Focus)</b>			
Contributions to Student Success & Belonging	Program self-assessment	Qualitative	✓
Contributions to Research & Knowledge Creation	Program self-assessment	Qualitative	
Contributions to Community Engagement & Impact	Program self-assessment	Qualitative	✓
Contributions to Financial & Institutional Resilience	Program self-assessment	Qualitative	
<b>Equity &amp; Access</b>			
Enrollment of underserved students (first-gen, Pell, URM)	OIRP / Gray DI	Quantitative	✓
<b>Community &amp; Regional Impact</b>			
Participation in community engagement (service-learning, internships, partnerships)	Program self-assessment	Qualitative	✓
Regional/state workforce alignment (program fields tied to HECC priorities or high-demand occupations)	OIRP	Mixed	✓
Community/regional needs fit (program responsiveness to emerging workforce/community needs) *	Program self-assessment	Qualitative	
<b>Interdisciplinary &amp; Institutional Role</b>			
Interdisciplinary collaboration (cross-listed courses, joint degrees, research/center partnerships)	Program self-assessment	Qualitative	
Distinctiveness within PSU and Oregon system (fills unique niche, avoids duplication)	OIRP/Gray DI	Qualitative	

Metric	Source	Quantitative / Qualitative	Workshop Priority
Differentiation strategy (makes PSU distinctive regionally/nationally) *	OIRP/Gray DI	Quantitative	
<b>Mission &amp; Stewardship</b>			
Program narrative of how it advances PSU's mission and values	Program self-assessment	Qualitative	✓
Shared stewardship (faculty, staff, student engagement in shaping program future) *	Program self-assessment	Qualitative	
<b>Student Populations</b>			
Student populations served (part-time, full-time, adult learners, first-generation) *	OIRP	Qualitative	
Campus climate contribution (program role in student belonging and environment) *	Program self-assessment	Qualitative	
*NACUBO-Inspired metrics			

### Organizational Viability Metrics

Metric	Source	Quantitative / Qualitative	Workshop Priority
<b>Program Size &amp; Scale</b>			
Number of majors (current and 5-year average)	OIRP/Gray DI	Quantitative	✓
Number of minors (current and 5-year average)	OIRP	Quantitative	
Number of degrees awarded (current and 5-year average completions)	OIRP	Quantitative	✓
Total SCH generated by program (majors + service courses)	OIRP	Quantitative	✓
Program size thresholds (below critical mass / sustainable scale, expressed in majors or SCH)	OIRP/OAA	Quantitative	✓
<b>Faculty &amp; Staff Capacity</b>			
Faculty headcount by category (tenure-track, NTT, adjunct)	OIRP/HR	Quantitative	✓
Ratio of tenure-line to total instructional faculty	OIRP/HR	Quantitative	✓
Advising ratios (students per faculty/advisor)	OIRP/Student Services	Quantitative	✓
Staff FTE dedicated to program support	OIRP/Program self-assessment	Mixed	
Accreditation/licensure faculty requirements (where applicable)	Program self-assessment	Qualitative	
<b>Organizational Resilience &amp; Operations</b>			

Metric	Source	Quantitative / Qualitative	Workshop Priority
Administrative support ratio (staff FTE supporting a program/student)	OIRP/OAA	Quantitative	
Organizational adaptability (capacity to restructure or innovate delivery models)	Program self-assessment	Qualitative	
<b>Sustainability Indicators</b>			
Reliance on adjunct faculty for core curriculum (% of SCH taught by adjuncts)	OIRP	Quantitative	✓
Capacity for enrollment growth (classroom/section utilization rates, advisor capacity)	OIRP/Program self-assessment	Mixed	✓
External support (grants, partnerships, endowments contributing to program sustainability)	OIRP/RGS/PSUF	Quantitative	
Risk exposure (e.g., small size, accreditation dependency, specialized faculty retirements)	Program self-assessment	Qualitative	✓

To ensure clarity and consistency in the classification process, OAA and RGS will develop a **Program Classification Framework** to guide the assignment of programs into each of the five categories ([See Appendix V](#)). This framework will describe the qualities and guiding characteristics of programs in each category across the five vitality domains. While not a scoring tool, the framework will provide structured descriptors to support professional judgment and promote transparency.

## Appendix V: Program Classification Framework

The Program Classification Framework provides a structured approach for translating Program Vitality Report evidence into actionable recommendations. Classifications are not rankings but **diagnostic categories** that guide decisions on investment, stabilization, redesign, or discontinuation. Each category integrates **quantitative metrics** (from OIRP, Gray DI, FADM) and **qualitative evidence** (program self-study, faculty input, accreditation considerations).

### Grow

**Definition:** Programs with strong evidence of high student success, robust market demand, positive financial contribution, and alignment with PSU's mission and state priorities, positioned for targeted investment and expansion.

**Evidence:**

- **Student Success:** High and/or increasing enrollments and completions; strong 5-year trends; retention and graduation rates above institutional averages; minimal equity gaps across subgroups.
- **Market Demand:** Gray DI shows strong labor market demand, high program demand percentiles, and competitive wages; projected job growth above national averages; healthy transfer pipelines and high admit-to-enrollment yield.
- **Financial Performance:** Positive and growing contribution margins; contribution as % of net revenue exceeds benchmarks; instructional cost per SCH at or below institutional norms; balanced faculty cost structure.
- **Mission Alignment:** Significant contributions to general education and service teaching; alignment with *Future in Focus* imperatives (student success, engagement, resilience, research); distinctiveness within PSU and Oregon's higher education system; recognized community/regional impact.
- **Organizational Viability:** Program size well above critical mass thresholds (majors, minors, SCH); adequate faculty and staff capacity; advising ratios within healthy ranges; low administrative burden relative to size.

### Sustain

**Definition:** Programs that perform at acceptable levels across all vitality domains, supporting PSU's mission without distinctive opportunities for rapid growth.

**Evidence:**

- **Student Success:** Stable enrollments and completions; adequate retention and progression; equity outcomes consistent with institutional norms.
- **Market Demand:** Steady job demand with moderate but sustainable wages; program demand percentile near national median.
- **Financial Performance:** Net margin positive or at break-even; contribution stable but not increasing; instructional costs within acceptable ranges.

- **Mission Alignment:** Continued role in general education or service SCH; alignment with PSU's mission and *Future in Focus* imperatives at a baseline level; provides steady institutional value without requiring major investment.
- **Organizational Viability:** Faculty and staff sufficient to sustain current scale; workload balanced; no immediate risks to long-term sustainability.

## Revitalize

**Definition:** Programs with clear mission importance but with weaknesses in student success, demand, or financial sustainability that require targeted interventions to restore vitality and relevance.

### Evidence:

- **Student Success:** Declining or low enrollments and completions; below-average retention or progression rates; persistent equity gaps; high DFW or withdrawal rates.
- **Market Demand:** Current student demand weak, but Gray DI data show moderate to strong workforce demand; competitor analysis suggests PSU could capture unmet market opportunities with adjustments.
- **Financial Performance:** Marginal or negative contribution margins; instructional costs per SCH above benchmarks; high reliance on adjunct faculty; discount rate disproportionately large.
- **Mission Alignment:** Despite weak performance, program contributes significantly to PSU's mission, state workforce priorities, or equity goals; plays a role in interdisciplinary connections or community engagement.
- **Organizational Viability:** Imbalanced faculty mix with insufficient tenure-line positions; high advising ratios; limited staff support; capacity for enrollment growth exists but underutilized.

## Sunset

**Definition:** Programs with persistent low demand, weak financial contribution, and limited mission alignment that are recommended for phased discontinuation, accompanied by teach-out plans to support current students.

### Evidence:

- **Student Success:** Consistently low majors, minors, and completions; 5-year declines in enrollment; retention and progression below benchmarks; widening equity gaps.
- **Market Demand:** Weak or declining labor market demand; limited job growth; low wages relative to degree costs; weak or shrinking transfer pipelines.
- **Financial Performance:** Persistent negative margins; contribution as % of net revenue very low; instructional cost per SCH well above norms; unsustainable reliance on adjuncts.
- **Mission Alignment:** Minimal contributions to general education or service SCH; limited relevance to *Future in Focus* imperatives; duplicative offerings within PSU or across Oregon's higher education system; declining community/regional impact.
- **Organizational Viability:** Program size below critical mass thresholds; insufficient faculty to sustain curriculum; high administrative workload relative to program size; high risk exposure due to faculty retirements or accreditation dependencies.

## Start

**Definition:** New or emerging programs with strong evidence of student demand, labor market alignment, and mission contribution, designed for strategic investment and launch.

**Evidence:**

- **Student Success:** Reliable recruitment channels identified through transfer partnerships or dual-credit programs; student interest demonstrated via surveys or applications to related fields; equity and retention considerations built into program design.
- **Market Demand:** Strong Gray DI projections for labor market growth and competitive wages; unmet workforce needs in Oregon and the region; competitor analysis shows limited local supply.
- **Financial Performance:** Financial modeling projects positive contribution within 3–5 years; instructional costs scoped to scale with enrollment growth; risk analysis completed.
- **Mission Alignment:** Clear alignment with PSU's *Future in Focus* imperatives and Oregon workforce priorities; strengthens PSU's distinctiveness; addresses emerging community/regional needs.
- **Organizational Viability:** Faculty expertise available or recruitable; staff and advising capacity planned; external partnerships (industry, community, peer institutions) identified to support launch; infrastructure sufficient to support early implementation.

## Appendix VI. Unit Vitality Profiles (Track 2)

The **Unit Vitality Profiles** will serve as the primary evidence base for assessing academic support units, centers/institutes, and administrative structures. These profiles integrate centrally prepared data with structured unit responses, ensuring that both quantitative evidence and qualitative context are considered in evaluations.

- **Centrally Prepared Data Sets** will be compiled by the Office of Institutional Research and Planning (OIRP), Finance and Administration (FADM), Human Resources (HR), and other relevant central offices.
- **Structured Unit Responses** will provide narrative context, addressing gaps in quantitative data and offering qualitative insights into distinctive contributions, challenges, and improvement strategies.

The metrics and evidence types identified for each unit type are prospective and illustrative. Not all measures will be available or applicable to every unit, and no single framework will fit all cases. Instead, the profiles will draw upon the most relevant and meaningful data for each unit, balancing comparability across the institution with recognition of distinct roles and contributions.

**Special Note:** *Academic Support Units will be evaluated using data previously provided through the FY2025 Financial Sustainability Workbooks and IPEB Strategic Planning Narratives, updated as needed to reflect current context. For centers/institutes and administrative structures, baseline data will be compiled centrally from financial, staffing, and organizational records. In all cases, the process integrates centrally identified data with unit-level reflection and responses, ensuring comparability across units while honoring distinct roles.*

### 1. Centers and Institutes

Metric	Source	Type
Budget allocations & expenditures by fund type	FADM	Quantitative
External revenue (grants, contracts, philanthropy) & 5-year trend	RGS, FADM	Quantitative
Ratio of external revenue to total budget	FADM	Quantitative
Facilities and Administrative Cost Recovery (5-year trend)	RGS	Quantitative
Staffing levels by role	HR	Quantitative
Cost per unit of service delivered	FADM, OIRP	Quantitative
Ratio of administrative to programmatic costs	FADM	Quantitative
Contributions to PSU's research productivity & reputation	Unit Response	Qualitative
Alignment with PSU's <i>Future in Focus</i> & state priorities	Unit Response	Qualitative
Collaborations with PSU units, community, industry	Unit Response	Qualitative
Distinctive contributions to scholarship & visibility	Unit Response	Qualitative
Strategies for sustaining/diversifying funding	Unit Response	Qualitative

## 2. Academic Support Units

Metric	Source	Type
FY2025 Financial Sustainability Workbooks & IPEB narratives (updated)	OAA/Unit Responses	Quantitative
Budget allocations & expenditures	OAA	Quantitative
Service utilization (participation counts, user demographics)	Unit Response	Quantitative
Service penetration (% eligible population served)	Unit Response	Quantitative
Student outcomes linked to service use (retention, progression)	OIRP	Quantitative
Staff FTE by role	HR	Quantitative
Advising/student-staff ratios	HR, OIRP	Quantitative
Contributions to equity & student success	Unit Response	Qualitative
Satisfaction levels of users (surveys, focus groups)	Unit Response	Qualitative
Evidence of unmet needs or growing demand	Unit Response	Qualitative
Growth capacity & strategies for scaling	Unit Response	Qualitative
Alignment with PSU mission & priorities	Unit Response	Qualitative

**Note:** This assessment will be conducted in parallel with PSU's administrative reorganization announced in July 2025. Beginning January 1, 2026, the Division of Enrollment Management and student support services from the Global Diversity & Inclusion office will transition into Academic Affairs. The review of academic support units described above will be integrated into these organizational changes, ensuring that decisions about structure and staffing are informed by consistent data and aligned with institutional priorities.

## 3. Administrative Structures

Metric	Source	Type
Budget allocations & expenditure trends	FADM	Quantitative
Staffing levels & FTE by role	HR	Quantitative
Administrative support ratios (staff per student/faculty served)	HR, OIRP	Quantitative
Span of control (average staff per manager)	HR	Quantitative
Staff turnover rates	HR	Quantitative
Leadership stability (average tenure of directors/chairs)	HR, OAA	Quantitative
Ratio of administrative to programmatic costs	FADM	Quantitative
Strategies for efficiency, consolidation, or shared services	Unit Response	Qualitative
Examples of cross-unit collaboration/shared services	Unit Response	Qualitative
Capacity to adapt to institutional change	Unit Response	Qualitative
Contributions to institutional coordination, accountability	Unit Response	Qualitative

*Note: The implementation of [Operational Excellence](#) recommendations (FY2025–26) will be integrated with this review. Recommendations include the creation of shared service centers in finance and HR, as well as a coordinated marketing and communications structure. Findings from the Administrative Structures review will inform and align with this ongoing implementation.*

## Appendix VII. Classification Framework for Centers/Institutes, Academic Support Units, and Administrative Structures

The following framework provides consistent definitions and evidence guidelines for classifying academic support units, centers/institutes, and administrative structures under Track 2 of PIVOT. Classifications are based on evidence drawn from **Unit Vitality Profiles**, which integrate centrally prepared data and structured unit responses.

**Note:** *These categories are planning tools, not fixed labels. Classifications will be based on the overall balance of evidence across domains rather than perfection in any one area. The framework is intended to provide clarity, consistency, and transparency for leaders and partners as PSU makes resource and organizational decisions under PIVOT.*

### Invest

**Definition:** Units that demonstrate strong alignment with PSU's strategic mission, deliver high-value services, and show potential for expanded impact if provided with additional resources.

**Evidence:**

- **Mission Alignment and Strategic Contribution:** Clear contributions to PSU's *Future in Focus* imperatives; strong alignment with state and regional priorities; documented partnerships with external partners and collaborators; measurable outcomes in equity, research, or community impact.
- **Financial and Operational Sustainability:** Stable or diversified revenue sources; strong return on investment (ROI); ability to scale without requiring disproportionate institutional subsidy.
- **Service Profile and Utilization:** High demand relative to capacity; long waitlists or unmet needs; evidence that services directly improve student retention, faculty productivity, or community engagement.
- **Organizational Design and Efficiency:** Effective leadership and governance structures; adequate staff capacity; lean administrative design that could support growth.

### Sustain

**Definition:** Units operating effectively and efficiently at their current scale and funding level, providing consistent value without requiring major changes.

**Evidence:**

- **Mission Alignment and Strategic Contribution:** Ongoing contributions to PSU's mission and priorities; evidence of steady, consistent outputs.
- **Financial and Operational Sustainability:** Balanced budget; costs proportional to outcomes; predictable funding model without volatility.
- **Service Profile and Utilization:** Stable service utilization appropriate to unit role; no evidence of oversupply or unmet demand.
- **Organizational Design and Efficiency:** Functional staffing and leadership; clear reporting lines; minimal duplication with other units.

### Reassess

**Definition:** Units with unrealized potential or inconsistent contributions that require additional review, support, or time to demonstrate their value.

**Evidence:**

- **Mission Alignment and Strategic Contribution:** Contributions exist but are inconsistent, poorly documented, or only loosely connected to PSU's strategic priorities.
- **Financial and Operational Sustainability:** Budgets dependent on general fund support without proportional outcomes; lack of diversified funding; uncertain long-term sustainability.
- **Service Profile and Utilization:** Declining or uneven service demand; overlap with other units; insufficient evidence that services impact student success, research, or community goals.
- **Organizational Design and Efficiency:** Leadership or staffing gaps; unclear roles or inefficient structures; turnover impeding performance.

### Restructure or Consolidate

**Definition:** Units that provide valuable services but whose organizational model, funding, or scope must change to ensure efficiency and long-term sustainability.

**Evidence:**

- **Mission Alignment and Strategic Contribution:** Contributions are valid but fragmented or overlapping; services could be more impactful if integrated with other units.
- **Financial and Operational Sustainability:** Costs exceed proportional benefits; duplicative expenditures across multiple units; reliance on high administrative overhead.
- **Service Profile and Utilization:** Demand is present but spread across several overlapping units; inefficiencies reduce accessibility or impact.
- **Organizational Design and Efficiency:** Overlapping leadership structures; unclear reporting lines; opportunities exist for shared services (e.g., HR, IT, finance).

### Phase Out

**Definition:** Units with persistent misalignment to PSU's mission, unsustainable financial models, or low demand, where continuation is not viable.

**Evidence:**

- **Mission Alignment and Strategic Contribution:** Limited or no connection to PSU's mission or strategic priorities; services outdated or no longer relevant.
- **Financial and Operational Sustainability:** Chronic deficits; heavy reliance on institutional subsidy with no path to sustainability; no external revenue potential.
- **Service Profile and Utilization:** Persistently low or declining demand; services duplicative of or replaceable by other units.
- **Organizational Design and Efficiency:** Ineffective or unstable leadership; minimal staff capacity; structures not resilient or adaptable.

## Appendix VIII. Timeline

ENGAGEMENT		Summer 2025		Fall 2025			Winter 2026			Spring 2026		
Lead	Action	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Provost	Present PIVOT to PSU community at Financial Town Hall and to PSU Board of Trustees											
Office of the Provost	Update PSU website with PIVOT Plan and share with campus											
Gen Ed Task Force	Facilitate campus-wide General Education Symposium											
Provost	Report on PIVOT plan to Faculty Senate and academic employees											
Provost	Communicate progress- PIVOT Pulsecheck newsletter, website updates, campus events											
Provost/ PSU Leadership Council	Discuss PIVOT progress - regular meeting											
Office of the Provost	Convene Transition Monitoring Team											
Provost/ Faculty Senate Steering	Discuss PIVOT progress - regular meeting											
Provost/ Board of Trustees	Discuss PIVOT progress - regular meeting											
Provost/ ASPSU	Discuss PIVOT progress- regular meeting											
Office of the Provost	Convene Implementation Steering Group											

<b>TRACK 1 - Academic Programs</b>		Summer 2025		Fall 2025			Winter 2026			Spring 2026		
<b>Lead</b>	<b>Action</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>Apr</b>	<b>May</b>	<b>Jun</b>
Academic Unit Leaders	Determine priority metrics for program vitality domains											
RGS/ Office of the Provost	Build/ share preliminary Program Vitality Reports/ Self-study instructions with Deans/ Dept.Chairs											
Academic Units/ Departments	Carry out program self-studies and submit self-study reports											
Deans' Council	Review program data and propose preliminary classifications.											
Academic Units/ Departments	Review and provide feedback on preliminary classifications											
Deans' Council	Incorporate feedback from departments on preliminary classifications											
Office of the Provost/ FADM	Conduct financial modeling for proposed classifications											
Gen Ed Task Force Steering	Develop and submit recommendations for Gen Ed curriculum											
Gen Ed Task Force Steering/ Provost/ Pres	Build proposal for Gen Ed Reform to be submitted to Faculty Senate Steering											
Deans' Council	Submit final classifications to Provost and President											
Provost/ President	Review classifications and provide feedback/ approval to Deans											
VP for Budget and Planning/ FADM	Integrate recommendations into budget planning and overall Bridge Plan											
Provost/ Academic Units	Finalize implementation plans for each program											

<b>TRACK 2 - Support Units and Administrative Structures</b>		Summer 2025		Fall 2025			Winter 2026			Spring 2026		
<b>Lead</b>	<b>Action</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>Apr</b>	<b>May</b>	<b>Jun</b>
OAA/ FADM / OIRP/ RGS	Determine relevant data on service units, centers, and institutes' Vitality Profiles											
Provost	Convene Core Review Team											
RGS/ Office of the Provost	Consult with support/center/institute unit leaders who will interact with unit vitality profiles											
Academic Leadership Team	Develop and share Unit Vitality Reports and guidance for self-assessments											
Unit Leaders	Carry out self-assessments and submit reports											
Core Review Team	Review assessments and draft preliminary classifications, sharing with unit leaders											
Unit Leaders	Review and provide feedback on preliminary classifications											
Core Review Team	Apply feedback to refined classifications											
Core Review Team	Submit final classifications to Provost and President											
Provost/ President	Review classifications and provide feedback/ approval											
Office of the Provost/ RGS Leadership	Communicate outcomes with units											
VP for Budget and Planning/ FADM	Integrate recommendations into budget planning and overall Bridge to the Future Plan											
Provost/ VPs, Center/Institute Ldrs	Develop implementation plans for each program											