**BRIEFING NOTE - Faculty of Humanities Portfolio Review and the Portfolio Advisory Group**

1. **What is Portfolio Review?**

Portfolio Review is part of our standard Teaching and Learning process and is embedded in both the continual monitoring process and periodic review. In other words, portfolio review should be seen as an on-going process and something that we do as a matter of routine .

It starts with horizon scanning when developing new programmes; colleagues routinely consider the size of the possible market, current competitor institutions and prospective students’ and employers’ needs and demands before developing a programme of activity. Horizon scanning and responding to changes in both the external and internal environments are an essential part of portfolio review activity.

For current programmes, colleagues regularly look at how effective they are at meeting students’ needs, making changes to content in the modules and units they teach, reviewing how and when they assess and making changes accordingly. We should also be reflecting on the effectiveness of programmes to recruit students and how we need to adjust programme content and/or promotion in order to achieve targets.

All this activity comes under the banner of portfolio review.

1. **Why do we undertake Portfolio Review?**

Student recruitment in the Higher Education sector has evolved in recent years to be more competitive and market-led.

As fees have increased students are taking an increasingly consumerist approach to selecting their place at University, which has resulted in a number of institutions investing heavily in market research, redesigning their portfolios and aligning programmes to market demand.

Although we are a research-intensive University, teaching is a significant area of our activity and, importantly, generates a substantial income. Every year we recruit more than 18,000 of the highest quality students across UG and PG and if we are to continue to compete we must evolve and respond to the needs of the market. To do this we need to take a strategic approach to our portfolio development and management.

1. **What benefit does Portfolio Review bring?**

Regular, comprehensive portfolio review positions us well against competitor institutions.

It places us at the forefront of programme development, helping to strengthen our reputation nationally and internationally. It helps us meet student recruitment targets, which brings financial benefits, and helps us respond to changes in the external environment. By offering high-quality, innovative and engaging programmes, which prospective students want to study we can further strengthen our reputation as a University. This, in turn, helps us attract the best students. This is true at UG and PG levels.

By undertaking a continuous process of portfolio review we are able to sustain a portfolio of programmes which are market-informed, aligned to our areas of research expertise and supporting our social responsibility activities.

As a Faculty we strive for a large and vibrant research culture and effective portfolio review at PGT level can significantly benefit this. Programmes which are attractive to prospective students and provide opportunities for PGT cohorts to discuss and debate, aligned to active research, brings great potential for progression into PGR. In order to achieve this, we need the space to develop innovative and attractive PGT programmes that are sector leading, and routine portfolio review supports this.

Routine portfolio review frees up resources for us to think, creates space for us to plan and develop programmes which are sustainable, in demand and meeting the needs of our future graduates and employers.

Through the Faculty-wide Portfolio Advisory Group (PAG) there are opportunities to identify and support cross-School programmes which the market demands which would be challenging to drive forward through the traditional School structures.

1. **Is Portfolio Review simply about closing programmes?**

Portfolio Review is about creating a sustainable, market - informed suite of programmes which are attractive to students, align to our research and support our social responsibility agenda.

Historically, as a Faculty there has been a devolved approach to portfolio review. This means in some areas there are processes which are embedded within the annual cycle of activity for developing new programmes and closing or redeveloping existing ones to ensure they continue to meet the needs of prospective and current students and respond to changes in the academic environment locally (incorporating new research, techniques or theories etc.), while in other areas there is no systematic approach to consider what programmes we offer.

In areas where routine Portfolio Review activity already takes place, inevitably some programmes do close, in order to respond to either internal or external changes, such as staff leaving or lack of demand from prospective students. This is part of our normal business and is essential if we are to respond to the changing higher education landscape.

There are also opportunities to redevelop existing programmes where there is a market for further development and opportunities can be identified for new programmes which currently aren’t delivered.

Another important area of portfolio review activity is horizon scanning and responding to changes in the external environment. By undertaking competitor analysis, monitoring trends in the popularity of A-level subjects and, amongst other things, identifying future skills required by employers we can ensure our portfolio remains appropriate.

* **How does portfolio review happen in the Faculty of Humanities?**
* In some, but not all, areas, portfolio review is embedded in Teaching and Learning activity and reviews of trends in programme recruitment and horizon scanning of potential new markets take place as a matter of course. Colleagues routinely monitor the external environment, making programme amendments and changes to units and modules to ensure they are academically challenging, rigorous and meet the needs of students. This may also happen as part of the ongoing ‘continual monitoring’[[1]](#footnote-1) activities undertaken by programmes and Schools throughout the year.
* More formal ‘periodic reviews’[[2]](#footnote-2), which take place every five to six years, highlight areas of success and plans are developed to capitalise upon these. Conversely, areas for change or development are identified and progressed.
* Preparation of School strategic plans are also used as a driver for horizon scanning and planning portfolio changes.
* The ‘programme approval’ processes[[3]](#footnote-3) require that proposers consider the size of the possible market, competitor activity and prospective students’ and employers’ needs and demands in developing a programme of activity. The Faculty also carries out ‘health checks’ on programmes in their first few years of activity, to ensure that they are meeting their predicted intake targets.

In recent years, this routine activity has been supported through the new Faculty Portfolio Advisory Group (PAG).

1. **What is the Portfolio Advisory Group (PAG)?**

PAG was launched in 2014, in order to continue the work that had been initiated by the University-wide Portfolio Review in 2012.

This process was embedded in the annual planning cycle in 2014 and, following feedback after its first full year in operation, PAG now meets five times a year with the aim of realigning our current portfolio to be more attractive to applicants and more competitive in the Higher Education market. Activity is split between an annual review of our current portfolio and horizon scanning to inform programme development.

It has representatives from each School as well as senior colleagues from Teaching and Learning, Communications and Marketing and Finance.

1. **How is PAG governed?**

PAG is a strategic group which is a sub-committee of the Humanities Teaching and Learning Committee and is chaired by the Associate Dean for Teaching, Learning and Students. It meets approximately five times a year.

It has representatives from each School, the Associate Dean for PGR, the Head of Faculty Communications and Marketing, the Head of Teaching, Learning and Students Support Services, the Head of Faculty Finance and the University’s Director of Student Recruitment and International Development.

It reports directly to the Dean’s Advisory Group (DAG), Humanities Policy and Resources Committee (HPRC) and Faculty Teaching and Learning Committee**How does PAG fit with the Humanities Programme Approvals Sub-Committee (PASC)?**

PAG operates alongside and supports Programme Approvals Sub Committee.

PASC is chaired by the Associate Dean for Teaching, Learning and Students and meets approximately seven times a year.

Its representatives include UG/PGT Directors/Directors of Teaching & Learning for each School, the Head of Faculty Teaching & Learning Support Services, the Faculty Teaching & Learning Manager and Officers, the UMSU Education Officer and Student Representatives.

Its remit includes to:

* Approve all curriculum changes and programme proposals (including those for discontinuation) recommended by Schools, including those delivered by partner institutions, to determine whether they are academically appropriate and financially sustainable, and make recommendations to the University accordingly.
* Promote and monitor the implementation of the University / Faculty / School strategies policies and regulations for undergraduate programmes.

PAG provides strategic direction and PASC is the body that approves the detail of a proposal.

1. **What are the priorities of PAG?**

PAG’s remit includes:

1. Manage a cycle of continual review of the existing portfolio of programmes in the Faculty of Humanities.
2. Work with Schools to develop their portfolio of programmes in response to the recommendations made by the Group.
3. Work with Schools in response to opportunities and developments identified through their own review activities, providing support, guidance and resource as appropriate.
4. For School representatives, work with Heads of Schools to communicate within their Schools.
5. Through a horizon scanning process, identify potential opportunities for developing new programmes or alternative delivery methods to new markets using readily available data sources and commissioned market research outputs.
6. Consider how existing Faculty resources to support portfolio development activity should be prioritised, and explore further potential resource opportunities.

Priorities for 16/17 are focused on realigning the current portfolio of programmes, across all Schools, to ensure our offering is attractive to applicants, competitive in the Higher Education market and sustainable. Activity is split between an annual review of our portfolio and horizon scanning to inform new programme development.

1. http://www.humanities.manchester.ac.uk/humnet/our-services/teaching-and-learning/quality-assurance/continual/ [↑](#footnote-ref-1)
2. http://www.humanities.manchester.ac.uk/humnet/our-services/teaching-and-learning/quality-assurance/periodic/ [↑](#footnote-ref-2)
3. http://www.humanities.manchester.ac.uk/humnet/our-services/teaching-and-learning/quality-assurance/npp/ [↑](#footnote-ref-3)