Board of Regents’

MUS
Strategic Plan
2017

Approved: July 2006
Updated: 2017

Found on-line at:
http://www.mus.edu/data/StratPlan/StrategicPlan.asp
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INTRODUCTION

The Montana University System Strategic Plan is the primary planning document of the Board of Regents. The Plan sets forth an agenda for higher education in Montana by delineating the strategic directions, goals, and objectives that guide the Montana University System (MUS).

History
In July 2006, after several years of study, public dialogue, and internal deliberations, the Board of Regents approved the Strategic Plan. Since then, updates have occurred annually, including revisions to strategic initiatives as well as a refreshing of the data within each goal.

The development of the Strategic Plan began with two primary initiatives. The first was to work more closely with the interim legislature to develop a set of mutually agreed upon accountability measures that would guide the MUS and evaluate progress. Working with the Postsecondary Education Policy and Budget (PEPB) subcommittee of the 57th Legislature, the Board of Regents did develop this set of accountability measures in July 2002. Subsequently, the PEPB subcommittee has updated the accountability measures. This latest set of agreed-upon measures evolved into “shared policy goals” and work to form one base for this strategic plan.

The second initiative was to work with the PEPB Subcommittee to explore new ways for the MUS take a more direct leadership role in the state’s economic development. This overall effort, called “Shared Leadership for a Stronger Montana Economy”, engaged a broad range of Montanans to prioritize specific initiatives that would help establish a new role for the MUS in strengthening the state’s economy. The Governor’s Office and several legislative interim committees were included in the effort. In July 2004, the Board of Regents and the PEPB subcommittee met jointly and agreed on three priority initiatives for immediate implementation:

- Develop stronger business-university system partnerships for workforce training;
- Remove barriers to access for postsecondary education; and
- Expand distance learning programs and training.

Goals
The Strategic Plan is comprised of three primary goals that contain a series of sub-goal statements and objectives within each area.

**Goal 1: Access & Affordability**
Increase the overall educational attainment of Montanans through increased participation, retention and completion rates in the Montana University System

**Goal 2: Workforce & Economic Development**
Assist in the expansion and improvement of the state’s economy through the development of high value jobs and the diversification of the economic base

**Goal 3: Efficiency & Effectiveness**
Improve institutional and system efficiency and effectiveness

Maintaining the high quality of our institutions and the education provided to our students is not listed as an explicit goal. This is because it is THE MOST IMPORTANT consideration for every goal and initiative of the Montana University System and is considered to be an integral part of every component of this strategic plan.
Guiding Principles

In order to provide a dynamic and effective strategic plan, the Board of Regents subscribes to the following Guiding Principles for the on-going development and review of the MUS Strategic Plan.

Systematic
The planning and review cycle for the MUS Strategic Plan will take place over the course of a biennium, whereby the Plan is assessed, reviewed, and updated at the beginning of each biennium.

Accountable
Outcomes and measurements of the strategic goals will be made public and communicated on a regular basis.

Inclusive
The planning and review process will seek to include a broad array of stakeholders from throughout the state.

Flexible
The MUS Strategic Plan is intended to be a flexible document that can adapt to the changing environment within higher education and throughout the state/nation.

Campus Connected
Campus strategic plans will be connected to the broader strategic goals in the MUS Strategic Plan.

Statewide Focus
The planning process will include a statewide focus on advancing higher education throughout the entire state.

National Context
National trends and initiatives will be considered throughout the planning process and aid in the development of strategies and initiatives.
Goal 1: Access & Affordability

System Initiatives:

- **Two-Year College**
  - Access: increase access and participation at two-year institutions by improving online educational opportunities, growing dual enrollment, customizing programs for nontraditional students, and promoting two-year education as a low-cost, viable entry point to high-demand occupations and/or to four-year degrees.

- **GEAR UP** (Gaining Early Awareness & Readiness for Undergraduate Programs): The purpose of this federal initiative is to increase the number of low-income students who are prepared to enter and succeed in postsecondary education. Montana GEAR UP provides college and career readiness services, such as tutoring, financial aid information, enrollment in rigorous academic courses, comprehensive mentoring, college visits, supplemental curriculum materials, and professional development for school staff. The program serves these students as they progress through middle and high school. Beginning in 2012-13 academic year, the GEAR UP grant began funding the ACT test for **all Montana public high school juniors**!

Updated: 12/30/2015

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**Goal Statement**

Prepare students for success in life through quality higher education

**Objective 1.1.1**

Improve postsecondary education participation rates, with particular attention to Montana residents in MUS institutions

**Metric 1.1.1**

**College Continuation Rate, Fall 2014**

% of high school graduates attending college immediately following graduation

---

**Montana College Continuation Rate**

% of Montana high school graduates enrolling in college in the fall semester immediately following graduation

<table>
<thead>
<tr>
<th>College Continuation Rate</th>
<th>2004</th>
<th>2006</th>
<th>2008</th>
<th>2010</th>
<th>2012</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td># of MT High School Graduates (public &amp; private)</td>
<td>11,007</td>
<td>10,734</td>
<td>10,986</td>
<td>10,246</td>
<td>9,575</td>
<td>9,228</td>
</tr>
<tr>
<td># of MT Grads Enrolling in College</td>
<td>6,236</td>
<td>6,141</td>
<td>6,153</td>
<td>6,217</td>
<td>5,841</td>
<td>5,714</td>
</tr>
<tr>
<td># of MT Grads Enrolling In-state</td>
<td>4,663</td>
<td>4,680</td>
<td>4,789</td>
<td>5,020</td>
<td>4,598</td>
<td>4,503</td>
</tr>
<tr>
<td># of MT Grads Enrolling Out-of-state</td>
<td>1,573</td>
<td>1,461</td>
<td>1,364</td>
<td>1,197</td>
<td>1,243</td>
<td>1,211</td>
</tr>
</tbody>
</table>

| % of MT Grads Enrolling in College | 57% | 57% | 56% | 61% | 61% | 62% |
| % of MT Grads Enrolling In-state | 42% | 44% | 44% | 49% | 48% | 49% |
| % of MT Grads Enrolling Out-of-state | 14% | 14% | 12% | 12% | 13% | 13% |
Goal 1: Access & Affordability

System Initiatives:

- Complete College MT: increase the number of degree and certificate recipients by implementing Game Changing Strategies, such as: shifting to performance funding, transforming remediation efforts, implementing programs that accelerate time to degree and incentivize full-time enrollment, and providing guided pathways that help ensure student success through the development of academic maps and intrusive advising.

- Montana TRiO Programs: through its longstanding TRiO programs, Montana has built a strong foundation and history in providing educational opportunity and promoting student success for low-income, first-generation students, and Americans with disabilities. These programs serve nearly 10,000 students per year and are found on nearly every campus in Montana:
  - Upward Bound
  - Educational Talent Search
  - Educational Opportunity Centers
  - Upward Bound Math & Science
  - Veterans’ Upward Bound
  - Student Support Services
  - Ronald E. McNair Post-Baccalaureate Achievement

MUS Strategic Plan

Retention & Completion

Goal Statement

Prepare students for success in life through quality higher education

Objective 1.1.2

Increase retention rates within the Montana University System

Metric 1.1.2

MUS Retention Rates

Percentage of First-time, Full-time Freshmen Returning for a Second Year of Enrollment in the MUS; source: CCA Metric

<table>
<thead>
<tr>
<th></th>
<th>2-year Colleges</th>
<th>4-year Universities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2005</td>
<td>74.6%</td>
<td>74.7%</td>
</tr>
<tr>
<td>Fall 2006</td>
<td>54.6%</td>
<td>58.9%</td>
</tr>
<tr>
<td>Fall 2007</td>
<td>54.6%</td>
<td>58.9%</td>
</tr>
<tr>
<td>Fall 2008</td>
<td>54.6%</td>
<td>58.9%</td>
</tr>
<tr>
<td>Fall 2009</td>
<td>54.6%</td>
<td>58.9%</td>
</tr>
<tr>
<td>Fall 2010</td>
<td>54.6%</td>
<td>58.9%</td>
</tr>
<tr>
<td>Fall 2011</td>
<td>54.6%</td>
<td>58.9%</td>
</tr>
<tr>
<td>Fall 2012</td>
<td>54.6%</td>
<td>58.9%</td>
</tr>
<tr>
<td>Fall 2013</td>
<td>54.6%</td>
<td>58.9%</td>
</tr>
<tr>
<td>Fall 2014</td>
<td>54.6%</td>
<td>58.9%</td>
</tr>
<tr>
<td>Fall 2015</td>
<td>54.6%</td>
<td>58.9%</td>
</tr>
</tbody>
</table>

Objective 1.1.3

Increase graduation rates within the Montana University System

Metric 1.1.3

Graduation Rates

% of 1st-time, full-time bachelor’s degree seeking students graduating in 100%, 150%, and 200% of expected program length;

(includes students that transferred and graduated from another MUS campus)

<table>
<thead>
<tr>
<th>Entering Cohort</th>
<th>3 year</th>
<th>4 year (100%)</th>
<th>5 year</th>
<th>6 year (150%)</th>
<th>7 year</th>
<th>8 year (200%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2006</td>
<td>0%</td>
<td>19%</td>
<td>41%</td>
<td>49%</td>
<td>52%</td>
<td>54%</td>
</tr>
<tr>
<td>Fall 2007</td>
<td>1%</td>
<td>20%</td>
<td>40%</td>
<td>48%</td>
<td>52%</td>
<td>53%</td>
</tr>
<tr>
<td>Fall 2008</td>
<td>1%</td>
<td>19%</td>
<td>40%</td>
<td>48%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fall 2009</td>
<td>1%</td>
<td>20%</td>
<td>40%</td>
<td>47%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fall 2010</td>
<td>1%</td>
<td>21%</td>
<td>41%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fall 2011</td>
<td>1%</td>
<td>23%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fall 2012</td>
<td>1%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Updated: June 2017
**Goal Statement**

Make higher education more affordable by offering more need-based financial aid and scholarships

**Objective 1.2.1**

Reduce the unmet student need for financial aid (increase need-based aid)

**Metric 1.2.1**

<table>
<thead>
<tr>
<th>State Funded Need-based Aid &amp; Average Support per Student</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>State Need-based Aid in MUS</strong></td>
</tr>
<tr>
<td>FY05</td>
</tr>
<tr>
<td>$3,6M</td>
</tr>
</tbody>
</table>

The average amount of state funded need-based aid per student in the nation ($539 per student) is more than ten times the amount in the MUS. (source: National Assc. of State Grant and Aid Programs)

**Objective 1.2.2**

Increase the percentage of students who receive grants and scholarships, as well as the average amount awarded.

**Loan Information**

In 2015-16, 52% of 1st-time, full-time Montana residents attending a campus in the MUS took out student loans for an average amount of $5,415; in 2002-03, 58% took out loans at an average of $3,290 per student (does not include parent PLUS loans).

From the graduating class of 2015-16, the average loan debt for all 4-year degree recipients was $16,687; 61% took out loans for an average of $27,504, of those who borrowed.

**Updated: June 2017**
**Goal 1:**
Access & Affordability

**System Initiatives:**

**Tuition Freeze:**
- Freeze on tuition for ten consecutive years (FY08 – FY17) at all two-year colleges.
- Regional 4-year campuses (Tech, MSUN, MSUN, and UMW) tuition frozen for 8 out of 10 years since FY08.
- MSU and UM, tuition frozen during 6 of the past 10 years.

**Regional Comparison 2016-17:** (avg. academic year tuition and fees for full-time students)
- MSU/UM = $6,551
- Regional Peers = $8,706
- MSUB, Tech, UMW, MSUN = $5,414
- Regional Peers = $6,873
- MUS 2-yr Colleges = $3,352
- Regional Peers = $3,590

**Financial Literacy:**
Campuses in the MUS are taking a coordinated and collaborative approach toward decreasing student loan debt. Assisted by grant funds obtained by OCHE, efforts to educate and communicate to students and parents the various resources available for paying for college, as well as improving students' abilities to manage their own finances are now occurring on all MUS campus.

**Objective 1.3.1**
Decrease average loan amounts and the percentage of students borrowing

**Student Loan Debt of First-time, Full-time Resident Students in the MUS**
(average loan amounts of students who borrowed; no parent PLUS loans included)

<table>
<thead>
<tr>
<th>Year</th>
<th>Avg Loan Debt</th>
<th>% Borrowing</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005-06</td>
<td>$3,340</td>
<td>57%</td>
</tr>
<tr>
<td>2006-07</td>
<td>$4,512</td>
<td>61%</td>
</tr>
<tr>
<td>2007-08</td>
<td>$5,512</td>
<td>55%</td>
</tr>
<tr>
<td>2008-09</td>
<td>$5,512</td>
<td>60%</td>
</tr>
<tr>
<td>2009-10</td>
<td>$5,512</td>
<td>55%</td>
</tr>
<tr>
<td>2010-11</td>
<td>$5,512</td>
<td>55%</td>
</tr>
<tr>
<td>2011-12</td>
<td>$5,512</td>
<td>55%</td>
</tr>
<tr>
<td>2012-13</td>
<td>$5,512</td>
<td>55%</td>
</tr>
<tr>
<td>2013-14</td>
<td>$5,512</td>
<td>55%</td>
</tr>
<tr>
<td>2014-15</td>
<td>$5,512</td>
<td>55%</td>
</tr>
<tr>
<td>2015-16</td>
<td>$5,512</td>
<td>55%</td>
</tr>
</tbody>
</table>

**Objective 1.3.2**
Decrease tuition as a percentage of median household income

**Regional Tuition & Fees Comparison**
Ratio of Tuition & Fees to Median Household Income, 2017-18
(based on Academic Year Rates for First-time, Full-time Resident Students)

<table>
<thead>
<tr>
<th></th>
<th>2-year Colleges</th>
<th>4-year Universities</th>
<th>Flagships/Doctoral Research</th>
</tr>
</thead>
<tbody>
<tr>
<td>MUS</td>
<td>7.0%</td>
<td>11.5%</td>
<td>14.2%</td>
</tr>
<tr>
<td>Regional Peers</td>
<td>6.3%</td>
<td>11.8%</td>
<td>14.6%</td>
</tr>
<tr>
<td>Montana University System</td>
<td>16.0%</td>
<td>15.0%</td>
<td>14.2%</td>
</tr>
<tr>
<td>WICHE Average</td>
<td>6.0%</td>
<td>6.0%</td>
<td>6.0%</td>
</tr>
</tbody>
</table>

**Objective 1.3.3**
Increase the amount of state support as a percentage of total personal income relative to peer states and historical levels

**State Appropriations for Higher Education per $1,000 of Personal Income**

<table>
<thead>
<tr>
<th>Year</th>
<th>Regional Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995</td>
<td>11th</td>
</tr>
<tr>
<td>2007</td>
<td>11th</td>
</tr>
<tr>
<td>2008</td>
<td>11th</td>
</tr>
<tr>
<td>2009</td>
<td>11th</td>
</tr>
<tr>
<td>2010</td>
<td>11th</td>
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<td>2011</td>
<td>10th</td>
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<tr>
<td>2012</td>
<td>10th</td>
</tr>
<tr>
<td>2013</td>
<td>8th</td>
</tr>
<tr>
<td>2014</td>
<td>8th</td>
</tr>
<tr>
<td>2015</td>
<td>7th</td>
</tr>
<tr>
<td>2016</td>
<td>8th</td>
</tr>
<tr>
<td>2017</td>
<td>9th</td>
</tr>
</tbody>
</table>

*Source: Gapminder Report; SHEEO State Higher Education Finance Report*
Goal 1: Access & Affordability

System Initiatives:

- **Dual Enrollment**: the MUS is offering credit for credit coupons to high school teachers who teach dual credit courses in order to further grow and incentivize early college opportunities statewide. Dual enrollment headcount is also a metric included in the MUS Performance Funding model for 2-year colleges.

- **Perkins/Tech Prep**: in collaboration with OPI, K-12 school districts, two-year colleges, and business and industry, strive to develop and promote sequential curriculum providing high school students with a clear, non-duplicative pathway from high school to two-year colleges and/or careers.

- **Montana Education Talent Search**: offers services to ensure that students complete high school and successfully enter college or vocational school. Talent Search is one of the federal TRIO programs (Talent Search, Upward Bound, Student Support Services) funded by the U.S. Department of Education and administered by the Commissioner of Higher Education since 1979.

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**Goal Statement**

Work collaboratively with the K-12 education system to increase high school academic preparedness, completion, and concurrent enrollment programs.

### Objective 1.4.1

Increase enrollment of at-risk and disadvantaged students

### Metric 1.4.1

**At-risk & Disadvantaged Student Enrollment in the MUS**

<table>
<thead>
<tr>
<th>At-Risk &amp; Disadvantaged Students</th>
<th>Fall 2007</th>
<th>Fall 2008</th>
<th>Fall 2009</th>
<th>Fall 2010</th>
<th>Fall 2011</th>
<th>Fall 2012</th>
<th>Fall 2013</th>
<th>Fall 2014</th>
<th>Fall 2015</th>
<th>Fall 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of Freshmen, Under-represented Minorities</td>
<td>8.2%</td>
<td>9.0%</td>
<td>9.2%</td>
<td>9.4%</td>
<td>10.7%</td>
<td>12.5%</td>
<td>12.8%</td>
<td>13.2%</td>
<td>14.1%</td>
<td>15.3%</td>
</tr>
<tr>
<td>% of Freshmen from Low-Income Families*</td>
<td>29.4%</td>
<td>29.1%</td>
<td>35.9%</td>
<td>40.5%</td>
<td>41.8%</td>
<td>39.6%</td>
<td>37.4%</td>
<td>34.3%</td>
<td>32.9%</td>
<td>NA</td>
</tr>
</tbody>
</table>

*students receiving Pell grants

### Objective 1.4.2

Expand outreach to top academic achievers graduating from Montana high schools

### Metric 1.4.2

**Top Performing Students in the MUS**

<table>
<thead>
<tr>
<th>ACT/SAT Test Takers</th>
<th>Fall 2007</th>
<th>Fall 2008</th>
<th>Fall 2009</th>
<th>Fall 2010</th>
<th>Fall 2011</th>
<th>Fall 2012</th>
<th>Fall 2013</th>
<th>Fall 2014</th>
<th>Fall 2015</th>
<th>Fall 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of Freshmen scoring in top quartile*</td>
<td>31%</td>
<td>31%</td>
<td>31%</td>
<td>32%</td>
<td>32%</td>
<td>32%</td>
<td>31%</td>
<td>30%</td>
<td>29%</td>
<td>29%</td>
</tr>
</tbody>
</table>

*students scoring ACT>24 or SAT>1129; percent calculated out of total number of students with test scores

### Objective 1.4.3

Increase early access to higher education through dual enrollment

### Metric 1.4.3

**Dual Enrollment Headcount**

![Dual Enrollment Headcount Graph]

[Graph showing dual enrollment headcount from Spring 2012 to Spring 2017]
Goal 1: Access & Affordability

System Initiatives:

- Two-Year College Access
  Promote two-year education as an affordable, viable portal to high-demand occupations and/or four-year degrees by bringing the comprehensive community college mission to all Montana two-year colleges; customizing programs for adults and broadening opportunities for high school students; focusing on effective remediation, degree completion and transfer; coordinating curriculum across the system, and creating the technology infrastructure that supports resource-sharing, improved access, and greater efficiency.

In Fall 2016, 27% of undergraduate students in the MUS enrolled at a 2-year college.
(source: MUS Data Warehouse)

Nationally, 49% of all undergraduates attending public higher education institutions enrolled at 2-year colleges (MT ranks 42nd in the nation).
(source: IPEDS)

Updated: June 2017
Goal Statement

Improve distance and on-line learning by coordinating online delivery of education across the entire Montana University System

**Objective 1.6.1**

Increase student enrollment in online courses

**Metric 1.6.1**

MUS Enrollment in Distance Learning* Courses

Unduplicated Headcount - students enrolled in at least one distance learning course

<table>
<thead>
<tr>
<th>MUS Distance Learning Initiative:</th>
</tr>
</thead>
</table>
| In the 2005 and 2007 legislative sessions, the Montana Legislature appropriated funds specifically aimed at increasing the availability of distance learning in the Montana University System.
| With these funds ($300,000 in 2005, $900,000 in 2007) the university system invested in distance learning resources, faculty, and infrastructure. As a result, Montana universities and colleges now offer more than 100 online degrees and over 700 internet courses.
| MUS.edu/online is a central location for students, faculty, and the public to find information on distance education opportunities and topics in the MUS.
| Faculty development webinars for on-line teaching: [www.mus.edu/online/webinars.asp](http://www.mus.edu/online/webinars.asp)
| Updated: June 2017

**Objective 1.6.2**

Increase the number of online courses and degrees

**Metric 1.6.2**

Number of Distance Learning Courses Offered

Fall 2005 - Fall 2015, Unduplicated Number of Courses Offered

<table>
<thead>
<tr>
<th>MUS Campus</th>
<th>Fall 2006</th>
<th>Fall 2007</th>
<th>Fall 2008</th>
<th>Fall 2009</th>
<th>Fall 2010</th>
<th>Fall 2011</th>
<th>Fall 2012</th>
<th>Fall 2013</th>
<th>Fall 2014</th>
<th>Fall 2015</th>
<th>Fall 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>2-year</td>
<td>143</td>
<td>156</td>
<td>165</td>
<td>177</td>
<td>183</td>
<td>200</td>
<td>220</td>
<td>210</td>
<td>222</td>
<td>212</td>
<td>217</td>
</tr>
<tr>
<td>4-year</td>
<td>254</td>
<td>315</td>
<td>328</td>
<td>359</td>
<td>401</td>
<td>434</td>
<td>495</td>
<td>515</td>
<td>533</td>
<td>536</td>
<td>575</td>
</tr>
<tr>
<td>MUS Total</td>
<td>397</td>
<td>471</td>
<td>493</td>
<td>536</td>
<td>584</td>
<td>634</td>
<td>715</td>
<td>725</td>
<td>755</td>
<td>748</td>
<td>792</td>
</tr>
<tr>
<td>Annual % Chg</td>
<td>16%</td>
<td>19%</td>
<td>5%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>13%</td>
<td>1%</td>
<td>4%</td>
<td>-1%</td>
<td>6%</td>
</tr>
</tbody>
</table>

source: MUS Data Warehouse, does not include CC's

*courses where instruction is delivered entirely outside of the traditional classroom setting and there is no “in-person” contact between student and teacher (i.e. on-line and/or video courses)
Goal Statement
Increase responsiveness to workforce development needs by expanding and developing programs in high demand fields in the state

Objective 2.1.1
Increase degrees and certificates awarded in high-demand occupational fields

Metric 2.1.1

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Certs. of Applied Sci.</td>
<td>87</td>
<td>62</td>
<td>68</td>
<td>69</td>
<td>88</td>
<td>57</td>
<td>-30</td>
<td>-34%</td>
</tr>
<tr>
<td>Associate Degrees</td>
<td>366</td>
<td>510</td>
<td>515</td>
<td>558</td>
<td>490</td>
<td>462</td>
<td>96</td>
<td>26%</td>
</tr>
<tr>
<td>Bachelor's Degrees</td>
<td>263</td>
<td>267</td>
<td>317</td>
<td>336</td>
<td>356</td>
<td>356</td>
<td>93</td>
<td>35%</td>
</tr>
<tr>
<td>Master's Degrees</td>
<td>45</td>
<td>95</td>
<td>158</td>
<td>161</td>
<td>145</td>
<td>166</td>
<td>121</td>
<td>269%</td>
</tr>
<tr>
<td>Professional Degrees</td>
<td>90</td>
<td>189</td>
<td>213</td>
<td>230</td>
<td>245</td>
<td>226</td>
<td>136</td>
<td>151%</td>
</tr>
<tr>
<td>Doctoral Degrees</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>9</td>
<td>8</td>
<td>800%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>852</td>
<td>1,123</td>
<td>1,271</td>
<td>1,354</td>
<td>1,325</td>
<td>1,276</td>
<td>424</td>
<td>50%</td>
</tr>
</tbody>
</table>

Source: MUS Data Warehouse, does not include CC’s

Objective 2.1.2
Increase job placement rates

Metric 2.1.2

Percentage of Resident Graduates Entering Montana’s Workforce
2014-15 Graduates Employed Within One Year of Graduation

- In 2015, 80% of resident students graduating from the MUS found employment in Montana within one year of graduation, up from 74% in 2009.
Goal Statement
Increase responsiveness to workforce development needs by expanding and developing programs in high demand fields in the state

Objective 2.1.3
Increase the number of certificates and degrees conferred in 2-year programs

Metric 2.1.3

<table>
<thead>
<tr>
<th>Degrees &amp; Certificates Awarded by MUS 2-year Colleges</th>
</tr>
</thead>
<tbody>
<tr>
<td>(does not include CCIs)</td>
</tr>
<tr>
<td>Certificates of Applied Science</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1500</td>
<td>1400</td>
<td>1300</td>
<td>1200</td>
<td>1100</td>
<td>1000</td>
<td>900</td>
<td>800</td>
<td>700</td>
<td>600</td>
<td>500</td>
</tr>
</tbody>
</table>

source: MUS Data Warehouse

Updated July 2017
Goal 2: Workforce & Economic Development

System Initiatives:

MUS Research Initiative: The MUS received an appropriation of $15M in state funds from the 2015 Montana Legislature to serve as seed money to leverage university-based research into strategic advancements for Montana’s economy. The fundamental purpose of this research initiative is to: (1) solve Montana problems with Montana solutions; (2) create good Montana private-sector jobs, and/or; (3) grow emerging and important research sectors that contribute to the diversity of Montana’s economy.

The Commissioner of Higher Education administered competitive grants to researchers on the basis of each project’s potential for private-sector job creation, commercialization, and economic return on investment for the State of Montana. Areas of emphasis include agriculture, natural resources and energy, materials and manufacturing, health and biomedical sciences, and technology and computer science.

For more details and complete list of funded projects, go to: http://www.mus.edu/research_initiative.asp

Updated: June 2017

Goal Statement
Establish collaborative programs among institutions, the private sector, and the state to expand research, technology transfer, the commercialization of new technologies, and the development of our entrepreneurs

Objective 2.2.1
Increase research & development receipts and expenditures

Metric 2.2.1
Research & Development Expenditures by State, 2015

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>WA</td>
<td>$112,304,270</td>
<td>$110,929,895</td>
<td>$109,612,283</td>
<td>$106,878,735</td>
<td>$118,388,115</td>
</tr>
<tr>
<td>CO</td>
<td>$3,407,301</td>
<td>$2,924,336</td>
<td>$2,815,426</td>
<td>$3,345,519</td>
<td>$3,291,941</td>
</tr>
<tr>
<td>AZ</td>
<td>$3,906,350</td>
<td>$3,140,745</td>
<td>$1,710,788</td>
<td>$2,696,257</td>
<td>$2,712,962</td>
</tr>
<tr>
<td>OR</td>
<td>$8,509,560</td>
<td>$7,273,560</td>
<td>$6,926,744</td>
<td>$7,569,062</td>
<td>$7,727,561</td>
</tr>
<tr>
<td>MT</td>
<td>$560,173</td>
<td>$648,325</td>
<td>$679,964</td>
<td>$694,977</td>
<td>$653,516</td>
</tr>
<tr>
<td>MUS Total</td>
<td>$190,231,489</td>
<td>$184,223,394</td>
<td>$180,017,788</td>
<td>$185,757,345</td>
<td>$211,310,998</td>
</tr>
</tbody>
</table>

source: National Science Foundation (NSF)
note: figures may differ slightly from the MUS annual data collection due to reporting criteria

MUS Research & Development Expenditures by Institution

<table>
<thead>
<tr>
<th>Campus</th>
<th>FY 2012</th>
<th>FY 2013</th>
<th>FY 2014</th>
<th>FY 2015</th>
<th>FY 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>MSU Bozeman</td>
<td>$112,304,270</td>
<td>$110,929,895</td>
<td>$109,612,283</td>
<td>$106,878,735</td>
<td>$118,388,115</td>
</tr>
<tr>
<td>MSU Billings</td>
<td>$3,407,301</td>
<td>$2,924,336</td>
<td>$2,815,426</td>
<td>$3,345,519</td>
<td>$3,291,941</td>
</tr>
<tr>
<td>MSU Northern</td>
<td>$3,906,350</td>
<td>$3,140,745</td>
<td>$1,710,788</td>
<td>$2,696,257</td>
<td>$2,712,962</td>
</tr>
<tr>
<td>UM Missoula</td>
<td>$61,543,835</td>
<td>$59,306,533</td>
<td>$58,272,583</td>
<td>$64,572,795</td>
<td>$78,536,903</td>
</tr>
<tr>
<td>MT Tech</td>
<td>$8,509,560</td>
<td>$7,273,560</td>
<td>$6,926,744</td>
<td>$7,569,062</td>
<td>$7,727,561</td>
</tr>
<tr>
<td>UM Western</td>
<td>$560,173</td>
<td>$648,325</td>
<td>$679,964</td>
<td>$694,977</td>
<td>$653,516</td>
</tr>
<tr>
<td>MUS Total</td>
<td>$190,231,489</td>
<td>$184,223,394</td>
<td>$180,017,788</td>
<td>$185,757,345</td>
<td>$211,310,998</td>
</tr>
</tbody>
</table>

source: MUS Annual Research Report
note: expenditures include all sponsored activities (research, instruction, and other sponsored activities) managed by the respective research business administrative offices as restricted funds via grants, contracts, or cooperative agreements, per BOR Policy 401 & 404

Objective 2.2.1
Increase technology licenses with Montana businesses

Metric 2.2.1
MUS Technology Transfer Activity

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Patents Issued</td>
<td>14</td>
<td>8</td>
<td>9</td>
<td>8</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Active Licenses (Total)</td>
<td>231</td>
<td>238</td>
<td>238</td>
<td>287</td>
<td>302</td>
<td>281</td>
</tr>
<tr>
<td>Active Licenses (in MT)</td>
<td>112</td>
<td>97</td>
<td>82</td>
<td>87</td>
<td>89</td>
<td>83</td>
</tr>
<tr>
<td>% Licenses w/ MT Companies</td>
<td>48%</td>
<td>41%</td>
<td>34%</td>
<td>30%</td>
<td>29%</td>
<td>30%</td>
</tr>
<tr>
<td>License/Patent Revenues</td>
<td>$215,628</td>
<td>$663,586</td>
<td>$454,479</td>
<td>$315,560</td>
<td>$437,782</td>
<td>$568,324</td>
</tr>
<tr>
<td>Reimbursed Patent Costs</td>
<td>$169,616</td>
<td>$258,379</td>
<td>$131,007</td>
<td>$250,155</td>
<td>$151,260</td>
<td>$597,996</td>
</tr>
</tbody>
</table>

source: MUS Annual Research Report
Expand graduate education capacity and opportunities in order to increase educational attainment of Montanans, fuel economic development, grow the research and development enterprise, and contribute to the cultural and social fabric of Montana and the region.

Objective 2.3.1
Increase the number and percentage of graduate students in the Montana University System.

Metric 2.3.1

Graduate Student Enrollment - Student FTE

- Source: MUS Data Warehouse; note: graduate FTE includes students enrolled in master’s, doctorate and professional programs

Objective 2.3.2
Increase graduate degree production, maintaining a strong concentration in science, technology, engineering, and math (STEM) fields.

Metric 2.3.2

MUS Graduate Degrees Awarded

Updated: July 2017
Goal Statement

Improve the accuracy, consistency and accessibility of system data, including the continued development of a comprehensive data warehouse.

IT Strategic Directions

In order to meet the three primary goals outlined in the Board of Regents’ Strategic Plan, the Montana University System will strive to implement the following Information Technology Strategic Directions:

1. Enterprise Information Systems

Develop an integrated information system with the goal of maximizing administrative efficiencies, allowing for seamless student enrollment between campuses, and promoting consistent business practices across all institutions.

Assumptions:

- The MUS will continue to make incremental steps toward developing a single integrated information system.
- Incremental steps include, but are not limited to, the following:
  - Utilizing a single instance of the administrative information software that is hosted and managed by the main campus on each side of the system (i.e. UM and MSU host a single instance of Banner for their affiliated campuses, with the potential for including the community colleges, as well as tribal colleges).
  - Allowing for multi-institutional functionality to enable (for example): enrollments from more than one campus on students’ schedules and transcripts, financial aid based on combined enrollment at more than one institution, centralized administrative services, such as, a single source for payroll generation.
  - Standardizing codes and data elements, as well as aligning business rules and practices.

2. Network Connectivity

Continue to develop and improve an education network that provides high speed telecommunication capabilities that link MUS institutions, provide connectivity to national research and education networks, and expand the reach of the MUS to remote areas of Montana.

3. Data Warehousing

Maintain and work to improve a system-wide data warehouse for the purpose of measuring the goals in Board of Regents’ Strategic Plan, collecting and reporting official enrollment, developing linkages with K-12 and workforce data, and producing and monitoring the MUS Operating Budget.
Goal 3: Efficiency & Effectiveness

System Initiatives:

- **Shared Services Initiative**: a collaborative effort between MUS campuses and the system office to pursue and achieve system-wide efficiencies:
  - Strive to improve administrative and support activities to provide better service to students and faculty on every campus
  - Enable resources to be leveraged across the entire organization
  - Reduce duplication and maximize resources

- **Expenditures by Program**: expenditures for Instruction, plus Academic Support, plus Student Services should account for at least 70% of total expenditures.

- **Cost Control**: controlling educational cost growth is a central tenet of an efficient and affordable educational system. The MUS strives to limit the growth in educational costs to the growth in CPI.

**Goal Statement**

Deliver efficient and coordinated services

**Metric 3.2.1**

Total Educational Revenue per Student FTE, FY16

Total educational revenue is the sum of public higher education state appropriations and public in-state and out-of-state net tuition. Figures are adjusted for cost of living and enrollment mix differences.

MT is ranked 46th in Nation


**Metric 3.2.2**

Expenditures by Program

Current Unrestricted Expenditures, Ed Units Only

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Instruction</td>
<td>53%</td>
<td>54%</td>
<td>52%</td>
<td>49%</td>
<td>48.8%</td>
<td>48.9%</td>
<td>49.5%</td>
<td>50.5%</td>
</tr>
<tr>
<td>Research</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1.1%</td>
<td>1.8%</td>
<td>2.6%</td>
<td>0.7%</td>
</tr>
<tr>
<td>Public Service</td>
<td>0%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>0.9%</td>
<td>0.9%</td>
<td>0.8%</td>
<td>0.9%</td>
</tr>
<tr>
<td>Academic Support</td>
<td>11%</td>
<td>11%</td>
<td>12%</td>
<td>12%</td>
<td>11.9%</td>
<td>11.7%</td>
<td>11.2%</td>
<td>11.4%</td>
</tr>
<tr>
<td>Student Services</td>
<td>9%</td>
<td>9%</td>
<td>7%</td>
<td>8%</td>
<td>8.7%</td>
<td>8.5%</td>
<td>8.2%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Institutional Support</td>
<td>10%</td>
<td>9%</td>
<td>9%</td>
<td>10%</td>
<td>8.6%</td>
<td>8.3%</td>
<td>7.9%</td>
<td>8.0%</td>
</tr>
<tr>
<td>Operation and Maintenance</td>
<td>13%</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
<td>10.9%</td>
<td>11.2%</td>
<td>11.3%</td>
<td>11.5%</td>
</tr>
<tr>
<td>Waivers &amp; Scholarships</td>
<td>2%</td>
<td>4%</td>
<td>7%</td>
<td>8%</td>
<td>9.1%</td>
<td>8.8%</td>
<td>8.5%</td>
<td>8.7%</td>
</tr>
</tbody>
</table>

Goal: at least 50% Instruction AND 70% Instruction + Academic Support + Student Services

FY 16 Actual: Instruction = 48.9%; Inst + AcSup+ StudServ = 69.1%
FY 17 Budget: Instruction = 50.5%; Inst + AcSup+ StudServ = 70.3%
MUS Strategic Plan

Transferability

Goal Statement
Deliver efficient and coordinated services.

Objective 3.3.1
Improve articulation and transferability among all 2-year and 4-year institutions, including community colleges and tribal colleges

Metric 3.3.1

MUS Transferability Initiative – Common Course Numbering

a. All undergraduate courses in the Montana University System will go through the process of common course numbering (CCN)
   ➢ By the end of Spring 2012, all undergraduates courses in the MUS will have gone through the CCN process (10,000 courses in more than 60 disciplines).

b. All courses deemed to be significantly similar must possess the same prefix, course number, title and credits; and directly transfer on a one-to-one basis
   ➢ See BOR Policy 301.5.5 – Equivalent Course Identification and Numbering

c. Common course numbering will result in a transparent computerized program that demonstrates transferable courses across the university system
   ➢ Link to Common Course Numbering Transfer Guide

Updated: June 2017

Office of the Commissioner of Higher Education 16
MUS Strategic Plan

Budget Allocation

Goal Statement
Biennial review/update of the budget allocation model consistent with state and system policy goals and objectives

Background
The Montana Legislature allocates the vast majority of funding for our education units in a “lump sum” that is then allocated by the Regents to the individual institutions within the system. How these funds are allocated is central to every strategic objective of the Board. In order to achieve the goals and objectives in this strategic plan, the basic funding allocation model must be continually analyzed. To be an effective tool for achieving our strategic goals, the allocation model should, at a minimum:

- Focus on financing for the state system, not only funding for the individual campuses;
- Be transparent as to the policy choices of the Regents, Legislature, and executive branch;
- Provide a framework for dealing with allocations to institutions, tuition revenues, financial aid, and mandatory fee waivers;
- Have a specific fund dedicated to furthering Regents’ priorities;
- Protect institutional viability by moderating the short-term effects of enrollment changes;
- Provide incentives for institutions to collaborate as a system;
- Ensure equity of funding among all institutions;
- Maintain an adequate base of funding and education quality for all institutions;
- Maintain a differential between 2-year and 4-year tuition.

Goal 3:
Efficiency & Effectiveness

Performance Funding

History:
In May 2013, the Montana University System (MUS) adopted a performance funding model to augment the university system’s allocation methodology for distributing state appropriations to campuses. This first version of the MUS performance funding model allocated $7.5 million of state dollars in fiscal year 2015, approximately 5% of total state appropriations. The model utilized two basic metrics for all campuses, freshmen to sophomore retention of first-time, full-time students and the annual number of undergraduate degrees and certificates awarded.

Following the approval of the initial performance funding model, a Performance Funding Taskforce comprised of MUS administrators and faculty leaders, designed a more detailed model. The Montana Board of Regents approved the model in May 2014 for allocation of funds in fiscal years 2016, 2017 and beyond. This current version of the performance funding model allocated $30 million of state appropriations ($15 million in both fiscal years 2018 and 2019), approximately 8% of the total state appropriation to the MUS educational units.

Performance Funding

In May 2014, the Board the Regents approved a new set of performance metrics designed to be used in 2015-16 and 2016-17 fiscal years, and beyond. Within this set of metrics, retention rates and completion numbers are measured for all MUS campuses. In addition, mission specific metrics are identified at the flagship and 2-year campuses. Degree counts in graduate programs and research expenditures are included in the flagship campus measurements, while early college enrollment of high school students coupled with a menu consisting of transfer rates, success in developmental education, credit accumulation, and licensure/exam pass rates round out the metrics for 2-year campuses. For all campuses, special weighting will be applied for Pell-eligible students (low income), American Indian students, nontraditional-age students, and veterans.

The Regents approved the amount of funding to be distributed in this new model. FY18 Allocations | FY17 Allocations | FY16 Allocations
In order to increase the overall educational attainment of Montanans and provide an efficient and effective system of higher education, the Board of Regents adopted a Success Agenda to augment the Strategic Plan and help guide the Montana University System.

1. Institutional Role Differentiation
- Define distinct roles for the primary components of the MUS (Doctoral Research Universities, Baccalaureate/Masters Universities, Comprehensive 2-year Colleges)
- Utilize role guidelines to serve as templates to develop policies and criteria that:
  - Sustain quality academic programs
  - Increase access AND student success
  - Guide development of new programs and research
  - Provide for efficient delivery of programs, services and overall administration
  - Emphasize collaboration with K-12
  - Target resource allocation

2. Admission Standards
- Utilize multiple criteria in admissions policies to help align students with the university/college that matches their academic preparation, goals, and abilities
- Strengthen enrollment management strategies, such as requiring more rigorous documentation of college readiness at doctoral/research universities, in order to improve student success
- Reaffirm the open admissions concept of comprehensive 2-year colleges within Board policy to improve access and clarify differences between 2-year and 4-year (College!Now)

3. Transferability
- Ensure seamless transferability between institutions through a system of common course numbering and aligned student learning outcomes
- Develop a Board approved transfer credential (e.g. Regents Transfer Program) to improve 2-year to 4-year transfer rates and success (College!Now)

4. Community College Programs (College!Now)
- Increase utilization, enrollment and degree production in community college programs by targeting:
  - Academically under-prepared
  - Pre-college students (dual enrollment)
  - Non-traditional students (25+ yrs.)
- Clarify and promote the community college mission in Montana and role within the MUS by:
  - Rebranding the Colleges of Technology
  - Defining regional hubs with differential tuition policy, program delivery, etc.

Regents’ Workgroup on Reform and Reinvention

In August of 2009 the Board of Regents designated a subcommittee of regents, along with six citizen advisors to serve as a workgroup to address topics related to reinventing and reforming the Montana University System.

Working throughout 2009 and 2010, the Workgroup focused its attention on providing guidance and recommendations related to the MUS 2-year Education Initiative (College!Now), mission differentiation, performance-based funding, system integration, and the MUS planning process.

Recommendations

Upon completion of their work, the Regents’ Workgroup recommends that the Board of Regents adopt a “Success Agenda” in order to increase educational attainment of Montanans and provide and efficient and effective system of higher education.

Additionally, the Regents’ Workgroup recommends that the Board of Regents include a set of Guiding Principles for Strategic Planning in the MUS Strategic Plan.
5. **Need-based Financial Aid**
   - Work to develop strategies to reduce unmet student need
   - Increase the amount of need-based student aid

6. **Program and Service Alignment**
   - Align program development, expansion, and contraction with consistently assessed workforce demands
   - Focus programming to eliminate unnecessary/undesired duplication of programs by:
     - identifying institutional niches
     - utilizing distance learning, especially for collaborative approaches
     - aligning business practices and integrating technology to improve system-wide collaboration and increase student access
   - Increase investment in research and graduate programming to amplify institutional expertise and improve Montana’s economy

7. **Performance-Based Funding**
   - Align targeted outcomes with institutional type through purposeful allocation of resources based on programming type
   - Associate achievement in key performance areas with aspects of funding (allocation model)
   - Define, measure, and reward success by institution

8. **Data and Information**
   - Integrate data throughout the MUS in order to:
     - Improve student access and services
     - Increase administrative efficiencies
     - Improve academic coordination
     - Produce quality data

9. **Communication & Advocacy**
   - Effectively communicate the University System’s “product” to stakeholders
   - Develop a focused marketing and public relations strategy to increase support for higher education

10. **Faculty and Staff Support**
    - Provide compensation and professional development adequate for recruiting and retaining the faculty and staff necessary to achieve success
    - Provide faculty and staff a meaningful role in institutional and system decision making