Montana University System

Board of Regents'

Strategic Plan

2010

Quick Reference Guide

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Found on-line at:
http://mus.edu/data/strategic_plan.asp

MONTANA UNIVERSITY SYSTEM

Strategic Plan 2010

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MONTANA UNIVERSITY SYSTEM

Strategic Plan 2010

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.

MUS Strategic Plan

College Participation

Goal 1:
Access & Affordability

System Initiatives:

- **Two-Year College Initiative:** increase access and participation at two-year institutions by improving online access, growing dual enrollment opportunities, 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.
- **Access to Success (A2S):** collaborative effort among states aimed at increasing the participation and success of low income students and students from ethnic/racial groups.
- **GEAR-UP** (Gaining Early Awareness & Readiness for Undergraduate Programs): a six-year federal grant awarded to Montana in 2005. This initiative encourages and supports students to set high academic expectations, stay in school, study hard and take appropriate courses to prepare them for college-level studies.
- **Faculty & Staff Recruitment and Retention Efforts:** the MUS will continue to involve faculty and staff in comparative analysis and development of recommendations for improving recruitment and retention.

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

Montana College Continuation Rate

Percentage of Montana High School Graduates Enrolling in College in the Fall Semester Immediately Following Graduation

College Continuation Rates	1994	1996	1998	2000	2002	2004	2006	2008	2010 (goal)
# of MT High School Graduates (public & private)	10,009	10,594	11,035	11,372	11,075	11,101	10,838	11,202	10,794
MT Continuation Rate % of MT Grads Enrolling in College	55%	55%	57%	54%	55%	57%	57%	56%	
WICHE Continuation Rate % of Grads in WICHE states enrolling in College	52%	53%	50%	49%	49%	51%	56%	NA	

In-state vs. Out-of-state Continuation Rates	1994	1996	1998	2000	2002	2004	2006	2008	2010
% of MT Grads Enrolling In-state -- MUS	35%	35%	36%	35%	35%	37%	38%	38%	43%
% of MT Grads Enrolling In-state (Private or Tribal)	4%	4%	5%	3%	4%	5%	5%	5%	
% of MT Grads Enrolling Out-of-State	16%	16%	15%	16%	16%	15%	14%	13%	

source: NCES, IPEDS Fall Enrollment Survey; high school graduates adjusted to equal WICHE, Knocking at the College Door 2006
Note: calcuations for WICHE state exclude CA.; MUS calculations include community colleges

MUS Enrollment, FY99 - FY09

Student FTE, Fiscal Year

Student Enrollment Categories (Residency Status and Educational Level)	FY99	FY09	%CHG 99 to 09
Resident Undergraduate	24,810	26,726	7.7%
Resident Graduate	1,672	2,303	37.7%
Total Resident	**26,482**	**29,029**	**9.6%**
Non-resident Undergraduate	5,539	4,879	-11.9%
WUE	892	1,644	84.3%
Non-resident Graduate	633	824	30.1%
Total Non-resident	**7,063**	**7,346**	**4.0%**
MUS Total (includes CC's)	**33,546**	**36,375**	**8.4%**

source: MUS Official Enrollment Report; note: Fiscal year enrollment is calculated by averaging FTE from Summer and Fall semester with Spring ((summer + fall)+spring)/2

Retention & Completion

Goal 1:
Access & Affordability

System Initiatives:

- **Montana University System Writing Assessment:** improve the college-readiness of high school students by raising student and teacher awareness of the qualities of college-level writing and providing students with an assessment of their writing proficiency during the junior year.
- **Two-Year College Initiative:** improve retention and graduation rates at two-year colleges by communicating consistently about college-readiness based on educational goals, emphasizing two-year degree completion and transfer, and reward retention and completion through performance-based allocations.
- **Veterans' Upward Bound:** a program designed to help military veterans refresh their academic skills so that they can successfully complete postsecondary education. Located at 15 sites statewide, this program provides educational services to over 2,000 low-income and first-generation college bound veterans. www.vubmt.com

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

Freshmen Retention Rates

Percent of 1st-time, Full-time Freshmen Returning for a Second Year of Enrollment

Institutional Type	Fall 2004 Cohort (returning Fall 05)	Fall 2005 Cohort (returning Fall 06)	Fall 2006 Cohort (returning Fall 07)	Fall 2007 Cohort (returning Fall 08)	Fall 2009 Cohort (returning Fall 10)
					goal
4-year Institutions					
MUS	69%	69%	70%	69%	75%
WICHE* States	73%	74%	70%	75%	
2-year Institutions					
MUS	55%	52%	48%	47%	57%
WICHE* States	57%	58%	56%	58%	

Note: data for WICHE states includes public, two and four-year, Title IV degree granting institutions only, minus CA ; MUS '2-year Institutions' include comm. Colleges; source: IPEDS Fall Enrollment Survey

Objective 1.1.3
Increase graduation rates within the Montana University System

Metric 1.1.3

Graduation Rates

4-year Institutions: Percent of 1st-time, Full-time Student Earning Bachelor's Degrees within 6 Years
2-year Institutions: Percent of 1st-time, Full-time Students Earning Associate Degrees within 3 Years and Certificates within 1.5 years

Institutional Type	Graduating Classes					
	2000-01	2004-05	2005-06	2006-07	2007-08	2009-10
4-year Colleges						goal
MUS	41%	41%	42%	41%	41%	45%
WICHE States	47%	50%	50%	49%	51%	
2-year Colleges						
MUS*	37%	38%	32%	31%	32%	40%
WICHE States	25%	28%	25%	24%	23%	

source: IPEDS Graduation Rate Survey
*includes both integrated 2-year programs at MSU-Northern and UM-Western, as well as MUS community colleges
Note: data for WICHE states includes public, two and four-year, Title IV degree granting institutions only (minus CA)

MUS Strategic Plan

Financial Aid

Goal 1:
Access & Affordability

State Funded Need-based Aid Programs:

Montana Tuition Assistance Program (MTAP) – Baker Grants
- Program consists of State and Federal (SLEAP) dollars
- Allocations based on FTE
- MUS, Community Colleges, and Tribal Colleges receive funds
- SLEAP program requires minimum of $2 state match for every $1 Federal.

Montana Higher Education Grant (MHEG)
- Program consists of State and Federal (LEAP) dollars
- Allocations based on FTE
- MUS, Community Colleges, and Tribal Colleges receive funds
- LEAP program requires minimum of $1 state match for every $1 Federal.

State Work Study
- Allocations based on FTE (adjustments made depending on campuses ability to use funds)
- MUS and Community Colleges receive funds

State SEOG Match
- Allocations based on campuses Federal SEOG allocations
- $1 State for every $3 Federal
- MUS and Community Colleges receive funds

Perkins Loan
- Allocations based on former Federal matching requirements
- UM-Missoula, MSU-Bozeman, MSU-Billings, and MT Tech receive funds

Goal Statement

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

Objective 1.2.1
Reduce the amount of unmet student need for financial aid

Metric 1.2.1

Unmet Need of Students Receiving Pell Grants
MSU & UM Figures (averaged)
(note: Pell serves as low-income, need-based indicator)

	2006-07	2008-09
Cost of Attendance	15,500	16,398
- *(minus)*		
Expected Family Contrition + *(plus)*	924	944
Average Aid Awarded	4,380	3,824
= *(equals)*		
Unmet Need (remaining costs)	10,197	11,630
# of Pell recipients	6,859	6,638
Total Unment Need	**$69,937,794**	**$77,196,704**

Objective 1.2.2
Increase the percentage of students who receive financial aid or scholarships

Metric 1.2.2

Percentage of First-time, Full-time Students Receiving Financial Aid

Academic Year	Federal Grants & Scholarships		State & Local Grants & Scholarships		Institutional Grants & Scholarships	
	MUS	Region Avg	MUS	Region Avg	MUS	Region Avg
2003-04	36%	29%	23%	22%	31%	31%
2007-08	31%	27%	22%	26%	30%	35%

Objective 1.2.3
Increase the average aid/scholarship award amount

Metric 1.2.3

Average Aid Awarded to First-time, Full-time Students

Academic Year	Federal Grants & Scholarships		State & Local Grants & Scholarships		Institutional Grants & Scholarships	
	MUS	Region Avg	MUS	Region Avg	MUS	Region Avg
2003-04	$2,983	$2,865	$1,683	$1,345	$1,837	$1,500
2007-08	$3,230	$3,189	$1,900	$1,692	$2,896	$1,844

source: IPEDS Student Financial Aid; note: regional average = WICHE states minus CA

Affordability

Goal 1:
Access & Affordability

System Initiatives:

- **Tuition Cap:** continue freeze on tuition for FY10 and FY11 at smaller four-year campuses and all two-year colleges
- **Two-Year College Initiative:** Increase access and participation at two-year institutions by improving online access, growing dual enrollment opportunities, 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.

Goal Statement

Promote postsecondary education affordability

Objective 1.3.1
Increase the amount of state support as a percentage of total personal income relative to peer states and historical levels

Metric 1.3.1

State Support for Higher Education Per Capita & Per $1000 of Personal Income

Regional Peer States	State Support Per $1000 of Personal Income (FY09)		State Support Per Capita (FY09)	
	Amount	Rank	Amount	Rank
Alaska	$10.64	4	$459	3
Arizona	5.70	13	189	13
Colorado	3.84	14	162	14
Hawaii	11.69	3	476	2
Idaho	8.65	7	279	8
Montana	6.14	10	211	11
Nevada	5.98	11	242	10
New Mexico	14.07	1	454	4
North Dakota	10.08	5	396	5
Oregon	5.78	12	209	12
South Dakota	6.69	9	251	9
Utah	9.94	6	302	6
Washington	6.78	8	287	7
Wyoming	11.90	2	589	1
Montana (FY95*)	8.18	11	198	7

source: 2009 Grapevine Report; SHEEO State Higher Education Finanace Report
*note: FY95 is adjusted for inflation

Objective 1.3.2
Decrease tuition as a percentage of median household income

Metric 1.3.2

Ratio of Tuition and Fees to Median Household Income

Institutional Type	1993-94	1999-00	2004-05	2009-10
2-year Institutions				
Montana	5.0%	6.5%	8.0%	7.5%
Regional Avg.	3.4%	3.8%	4.5%	5.4%
4-year Institutions				
Montana	6.8%	8.7%	11.5%	11.0%
Regional Avg.	5.4%	6.2%	7.4%	8.4%
Doctoral Institutions				
Montana	7.6%	9.6%	13.2%	13.2%
Regional Avg.	6.2%	7.0%	8.4%	9.5%

source: WICHE

Note: Tuition and fees used in the calculation are the average resident tuition and fees for full-time undergraduates within each sector for each state. The WICHE average median household income was calculated as a simple average of the 15 member states (excluding CA).

MUS Strategic Plan

K-20 Collaboration

Goal 1:
Access & Affordability

System Initiatives:

- **Perkins/Tech Prep:** in collaboration with OPI, K-12 school districts, two-year colleges, and business and industry, 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 University System Writing Assessment:** improve the college-readiness of high school students by raising student and teacher awareness of the qualities of college-level writing and providing students with an assessment of their writing proficiency during the junior year.
- **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. The program director at OCHE supervises coordinators who provide educational outreach to over 1,200, primarily American Indian, students at 32 junior and senior high schools in five target areas throughout Montana.

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
Expand outreach to at-risk and disadvantaged students as to the importance and accessibility of postsecondary education and the quality of the MUS

Metric 1.4.1

At-risk & Disadvantaged Student Enrollment in the MUS

% of MT High School Graduates Entering the MUS from Low-income Families/Minorities

At-Risk & Disadvantaged Students	Fall 2003	Fall 2004	Fall 2005	Fall 2006	Fall 2007	Fall 2008	Fall 2009
% of Freshmen, Racial/Ethnic Minorities	5.7%	6.1%	6.0%	6.5%	7.8%	7.5%	8.1%
% of Freshmen from Low-Income Families*	Data coming soon						

source: MUS High School Follow-up Report
*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

% of MT High School Graduates Entering the MUS with ACT Scores in the Top Quartile*

ACT Test Takers	Fall 2003	Fall 2004	Fall 2005	Fall 2006	Fall 2007	Fall 2008	Fall 2009
% of Freshmen scoring in top quartile*	28%	28%	29%	29%	30%	29%	29%

*score between 25-36
source: MUS High School Follow-up Report, does not include CC's

Objective 1.4.3
Increase dual enrollment and advanced placement programs

Metric 1.4.3

Advance Placement Testing and Early College Enrollment

# of MT High School Student Taking AP Exams and Colleges Courses

MT High School Students	2004-05 (Fall 04)	2005-06 (Fall 05)	2006-07 (Fall 06)	2007-08 (Fall 07)	2008-09 (Fall 08)
# taking AP Exam	2,189	2,204	2,469	2,623	2,650
# enrolled in at least one college course in MUS*	439	616	576	613	746

source: College Board, State Report; MUS Data Warehouse (does not include CC enrollments)
*freshmen early admits, admit_code = 'FE', includes CC's (execpt DCC)

Two-Year Education

Goal 1:
Access & Affordability

System Initiatives:

- **Two-Year College Initiative:** 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.

Goal Statement

Increase postsecondary enrollment of traditional and non-traditional students through expanded outreach programs, evening/weekend programs, and 2-year programs

Objective 1.5.1
Increase enrollment in two-year programs

Metric 1.5.1

Two-Year Enrollment

Student FTE

MUS Educational Units	Fiscal Years							
	2002	2003	2004	2005	2006	2007	2008	2009
Colleges of Technology								
MSU Billings COT	510	580	660	667	668	699	706	658
MSU Great Falls COT	952	1,053	1,098	1,093	1,186	1,212	1,213	1,353
Um Missoula COT	802	886	896	917	1,019	1,098	1,276	1,423
MT Tech COT	295	232	260	280	303	304	349	331
UM Helena COT	736	738	749	684	733	719	734	806
Total COT	3,294	3,489	3,663	3,641	3,910	4,033	4,277	4,570
Year-to-year % change	5.8%	5.9%	5.0%	-0.6%	7.4%	3.1%	6.1%	6.8%
Community Colleges								
Dawson CC	445	415	450	497	500	401	401	451
Flathead Valley CC	1,289	1,414	1,642	1,457	1,369	1,265	1,360	1,557
Miles CC	509	473	509	542	469	454	446	459
Total CC's	2,243	2,302	2,601	2,496	2,338	2,119	2,206	2,468
Year-to-year % change	7.2%	2.6%	13.0%	-4.1%	-6.3%	-9.4%	4.1%	11.9%
Total 2-Year Education	5,538	5,791	6,265	6,137	6,248	6,152	6,483	7,037
Year-to-year % change	6.3%	4.6%	8.2%	-2.0%	1.8%	-1.5%	5.4%	8.5%

source: MUS Official Enrollment Report

Objective 1.5.2
Increase programs and classes for non-traditional students, including evening and weekend programs

Metric 1.5.2

Non-traditional Student Enrollment

Unduplicated Headcount

MUS Campuses (including CC's)	Fall 2002		Fall 2009		Fall 02 to Fall 09	
	25+ yrs.	% Dist (25+ yrs.)	25+ yrs.	% Dist (25+ yrs.)	# CHG (25+ yrs.)	% Dist (25+ yrs.)
4-year	9,195	28.4%	10,075	29.7%	880	1.3%
2-year	3,352	47.6%	4,676	41.3%	1,324	-6.3%
MUS Total	**12,547**	**31.8%**	**14,751**	**32.6%**	**2,204**	**0.8%**

source: MUS Data Warehouse, CC reports

Distance Learning

Goal 1:
Access & Affordability

System Initiatives:

MUS Distance Learning Initiative:

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 70 online degrees and nearly 500 internet classes.

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.

MUS On-line Degree & Certificate Programs: www.mus.edu/online/Degrees/index.asp

Faculty development webinars for on-line teaching: www.mus.edu/online/webinars.asp

Goal Statement

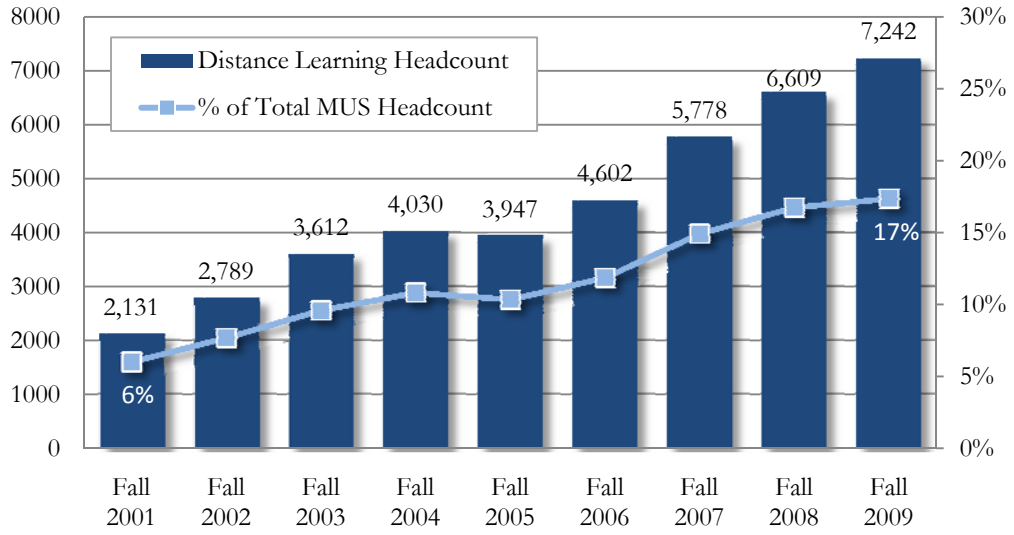
Improve distance and on-line learning by coordinating online delivery of education across the entire Montana University System

Objective 1.6.1
Increase student enrollment in online courses

Metric 1.6.1

MUS Enrollment in Distance Learning* Courses

Unduplicated Headcount - enrollment in at least one distance learning course



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

Objective 1.6.2
Increase the number of online courses and degrees

Metric 1.6.2

Number of Distance Learning Courses Offered

Fall 2001 - Fall 2009, Unduplicated Number of Courses Offered

MUS Campus	Fall 2001	Fall 2002	Fall 2003	Fall 2004	Fall 2005	Fall 2006	Fall 2007	Fall 2008	Fall 2009
2-year	39	58	82	95	103	143	156	165	177
4-year	93	153	208	243	239	254	315	328	359
MUS Total	132	211	290	338	342	397	471	493	536
Annual % Chg		59.8%	37.4%	16.6%	1.2%	16.1%	18.6%	4.7%	8.7%

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

Workforce Development

Goal 2:
Workforce & Economic Development

System Initiatives:

- **Perkins:** Promote preparation for and entry into high-wage, high-demand careers, with particular emphasis on under-represented demographics, by building strong career/technical education programs in K-12 school districts, two-year colleges, and community-based organizations.
- **Tech Prep:** In collaboration with OPI, K-12 school districts, two-year colleges, and business and industry, 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.

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 employer satisfaction with graduates

Metric 2.1.1
For the metric, employer satisfaction is measure at the program level within each two-year institution. Program-level employer satisfaction surveys results are located: http://mus.edu/data/employer_satisfaction.asp

Objective 2.1.2
Increase degrees and certificates awarded in high-demand occupational fields

Metric 2.1.2

Healthcare Degrees & Certificates Awarded

Degrees	1994-95	1999-00	2004-05	2005-06	2006-07	2007-08	goals 2009-10
2-year degrees & certificates	288	313	482	517	598	515	740
4-year degrees & above	337	278	327	394	367	387	450
Total	625	591	809	911	965	902	1190

source: IPEDS Completions Survey; note: data include community colleges

Construction-related Degrees & Certificates Awarded

Degrees	1994-95	1999-00	2004-05	2005-06	2006-07	2007-08	goals 2009-10
2-year degrees & certificates	151	201	212	188	202	250	249
4-year degrees & above	177	177	170	162	137	146	177
Total	328	378	382	350	339	396	426

source: IPEDS Completions Survey; note: data include community colleges

Objective 2.1.3
Increase job placement rates

Metric 2.1.3

Job Placement - Construction & Healthcare Related Majors

Students graduating in construction and healthcare related programs that enter the workforce in Montana within six months of leaving the institution

	# Graduating	Employed in MT Following Graduation		Employed Graduates Working in Field of Study	
	2006-07	#	%	#	%
Construction	323	224	69%	52	23%
Healthcare	866	640	74%	453	71%

source: MUS Data Warehouse, Unemployment Insurance Wage Records, Quarterly Census of Employment and Wages

Workforce Development

(Continued)

Goal 2:
Workforce & Economic Development

System Initiatives:

- **Montana Career Information System**: In collaboration with the Student Assistance Foundation, OPI, and the Department of Labor, raise career awareness and promote career/technical education for both traditional and nontraditional students through a dynamic, online program depicting job opportunities in Montana, assessing skills and interest, and providing curriculum counseling.
- **Two-Year College Initiative:** Promote two-year education as a cost-effective, high-quality portal to high-demand, high-wage careers by establishing regional workforce response teams comprised of business and industry leaders, economic development organizations, K-12 school districts and local two-year colleges.

Goal Statement

Increase responsiveness to workforce development needs by expanding and developing programs in high demand fields in the state

Objective 2.1.4
Increase the number of certificates and degrees conferred in 2-year programs

Metric 2.1.4

Associate Degrees Conferred

Associate of Applied Science, Associate of Arts, & Associate of Science, 1999-00 to 2007-08

Institutional Type	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	goal 2009-10
Colleges of Technology[1]	632	674	687	764	800	772	782	837	832	
Community Colleges	450	392	408	448	511	523	497	345	355	
Integrated 2-year Programs[2]	153	145	148	188	175	166	148	139	122	
Total	1235	1211	1243	1400	1486	1461	1427	1321	1309	1570
% Change (annual)		-1.9%	2.6%	12.6%	6.1%	-1.7%	-2.3%	-7.4%	-0.9%	

Certificates Conferred

Certificates of Achievement Below the Baccalaureate Level, 1999-00 to 2007-08

Institutional Type	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	goal 2009-10
Colleges of Technology[1]	239	168	127	140	122	138	167	266	281	
Community Colleges	33	18	20	36	132	54	107	49	64	
Integrated 2-year Programs[2]	-	-	-	-	-	-	2	6	9	
Total	272	186	147	176	254	192	276	321	354	304
% Change (annual)		-31.6%	-21.0%	19.7%	44.3%	-24.4%	43.8%	16.3%	10.3%	

Notes
1) includes associate degrees conferred at MT Tech & MSUB
2) UM-Western & MSU-Northern
source: IPEDS Completions Survey

Research & Development

Goal 2:
Workforce & Economic Development

System Initiatives:

Montana Science Serving Montana Citizens is a statewide science and technology plan for higher education and related enterprises in Montana. The *Plan*, developed by the MUS Science and Technology Advisory Committee (MUSSTAC), will help identify priorities for the MUS and the State of Montana in the allocation of resources to a research enterprise that has great potential to grow and flourish http://mus.edu/research/MUSSTACbrochure.pdf

EPSCoR
Sponsored by grants from the National Science Foundation (NSF), the Experimental Program to Stimulate Competitive Research (EPSCoR) is designed to promote the development of science and technology resources across the United States. Through partnerships with universities, government, and small businesses, Montana NSF EPSCoR operates on the principle that aiding researchers and institutions in securing federal research and development funding will develop the state's research infrastructure and advance economic growth. http://www.mtnsfepscor.org/about.html

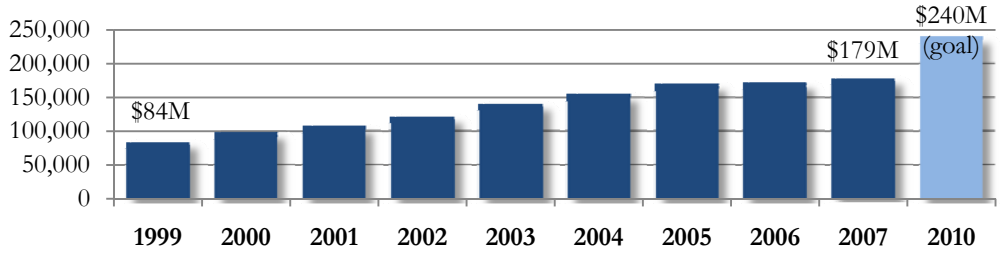
Goal Statement

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

MUS Research & Development Expenditures
(in millions)



MUS Research & Development Expenditures by Institution

Campus	FY 2006	FY 2007	FY 2008	FY 2009
MSU Bozeman	$103,048,865	$102,116,323	$96,150,553	$98,431,691
MSU Billings	$713,093	$625,580	$818,395	$314,253
MSU Northern		$61,337	$334,556	$434,634
UM Missoula	$60,070,832	$62,119,445	$62,405,729	$67,116,785
UM MT Tech	$7,842,753	$7,141,492	$7,882,940	$8,408,515
MUS Total	**$171,675,543**	**$172,064,177**	**$167,592,173**	**$174,705,878**

source: MUS Annual Research Report; Note: NSF and MUS Annual Research Report data are not directly comparable. NSF data includes state, pass through, and student support service funds that are not included in the MUS Research Report.

Objective 2.2.1
Increase research & development receipts and expenditures

Metric 2.2.1

MUS Technology Transfer Activity

Montana State University	FY 2006	FY 2007	FY 2008	FY 2009
Patents Issued	3	11	10	18
Active Licenses (Total)	109	130	153	184
Active Licenses (MT Companies)	68	81	89	105
License/Patent Revenues	$49,949	$69,165	$221,614	$290,690
Reimbursed Patent Costs from Licenses	$169,982	$138,562	$442,630	$267,142

University of Montana	FY 2006	FY 2007	FY08	FY09
Patents Issued (annual)	22	28	2	5
Active Licenses (Total)	23	24	22	21
Active Licenses (MT Companies)	14	15	16	12
License/Patent Revenues	$0	$0	$0	$19,203
Reimbursed Patent Costs from Licenses	$0	$0	$0	$4,000

source: MUS Annual Research Report

Information Technology

Goal 3:
Efficiency & Effectiveness

System Initiatives:

- **CC Banner Integration:** integrate Dawson Community College and Miles Community College into University of Montana hosted instance of Banner
- **MSU Unified Information System Project:** establish a single, unified and standardized information system, based on standardized policies, procedures, data elements and calendars for all campuses and agencies of MSU
- **Northern Tier Network:** operate and maintain a state-of-the-art network which provides high speed connections between campuses, as well as connections to national research and education networks.
- **K-20 Data Linkage:** develop linkages between K-12, postsecondary, and labor information in order to produce a method for annually tracking student cohorts from high school to college to the workforce.

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.

Efficiency

Goal 3:
Efficiency & Effectiveness

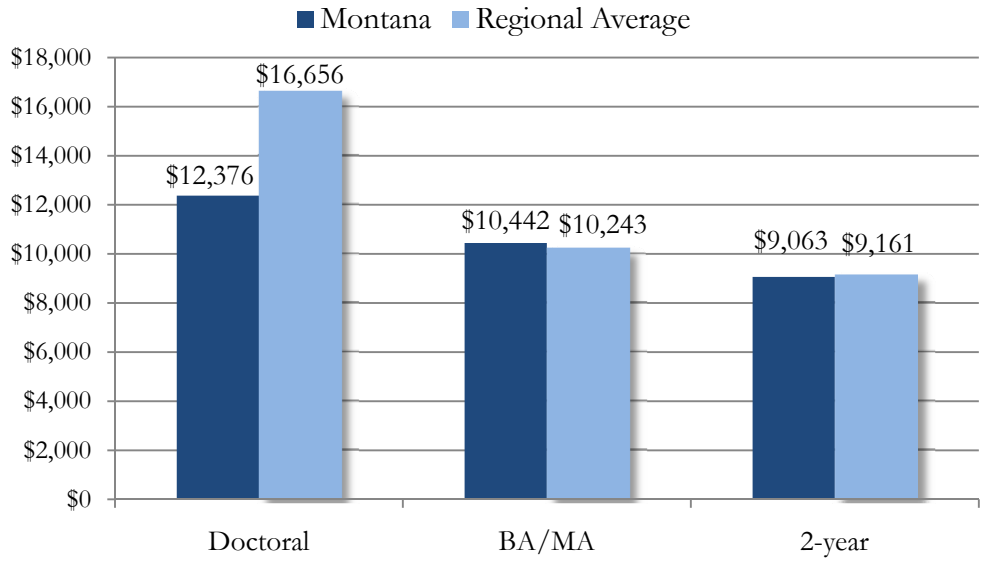
System Initiatives:

- **Two-Year College Initiative:** create efficiencies in curriculum and information enterprise systems that clarify college-readiness and improve the efficiency of the high school to college transition and that allow the system to serve more students more affordably.
- **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 must be 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

Total Revenue per Student FTE, 2008
WICHE Regional Peers, Public, Title IV



source: IPEDS Finance Survey

MUS Expenditures by Program

Expenditure Program Areas	1985	1995	2005	2010 (budgeted)
Instruction	53%	54%	52%	49%
Research	1%	1%	1%	1%
Public Service	0%	1%	1%	1%
Academic Support	11%	11%	12%	12%
Student Services	9%	9%	7%	8%
Institutional Support	10%	9%	9%	10%
Operation of Plant	13%	12%	12%	12%
Scholarships/Fellowships/Waivers	2%	4%	7%	8%
Instruction + Acad. Support + Stud. Services	74%	74%	71%	68%

source: OCHE Operating Budgets

Transferability

Goal 3:
Efficiency & Effectiveness

System Initiatives:

MUS Transferability Initiative:

The 2007 Legislature appropriated $1.5 million to help the MUS improve the transferability of courses and further develop its centralized data system.

As a result, the MUS initiated a ***"common course numbering"*** process for all undergraduate courses. This process requires that all courses deemed to be equivalent must possess the same course prefix, number, and title; all courses with same name and number will directly transfer on a one-to-one basis with equivalent courses at the receiving institution.

Progress:
As of January 2010, more than 6,500 courses in 40 disciplines have gone through the Common Course Numbering process.

Goal Statement

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

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

Benchmarks:
- 12 disciplines completed by January 1, 2009
- 10 additional disciplines completed by June 30, 2009
- All disciplines completed by June 30, 2011

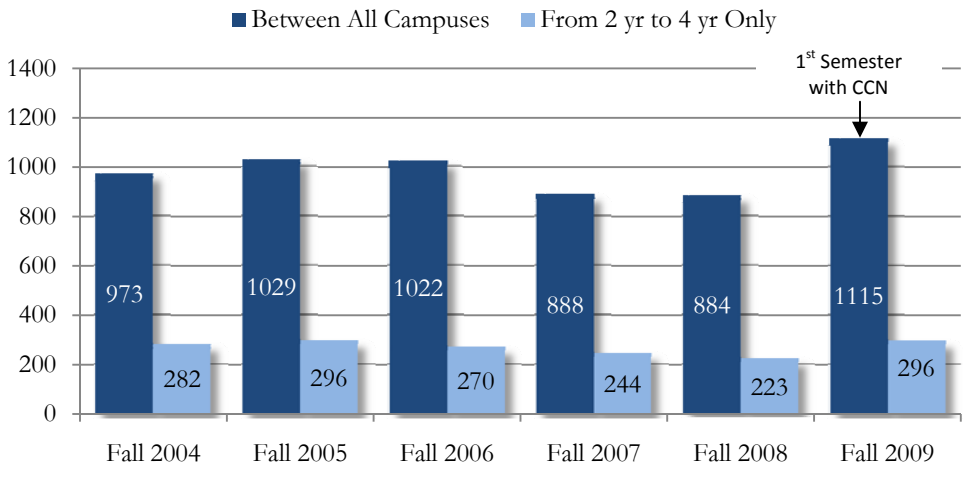
b. All courses deemed to be significantly similar must possess the same prefix, course number, title and credits; and directly transfer on a one-to-one basis

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

Benchmark:
Link to Common Course Numbering Transfer Guide

New Transfer Student Enrollment Between MUS Institutions



source: MUS Data Warehouse

Budget Allocation

Goal 3:
Efficiency & Effectiveness

System Initiatives:

- **Allocation Model Review:** the present "base plus" allocation model requires a comprehensive review/update. System goals, Regents' priorities, enrollment changes, performance/ outcomes and incentive funding are a few of the critical issues requiring study and analysis, as we move toward a revised allocation model.

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.