



MONTANA UNIVERSITY SYSTEM
Office of the Commissioner of Higher Education

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AGENDA - Planning Session
Montana Board of Regents
Wednesday, July 12, 2006
On the Campus of Flathead Valley Community College
10:15 A.M.

- 10:15 A.M. MUS HISTORICAL REVIEW: "20 years in 10 minutes" ([Link](#)) Pg. 2
Followed by Discussion
- 10:45 A.M. CAMPUS STRATEGIC PLANS
Discussion of strategic planning processes at campuses as related to
system strategic planning. Campus examples provided by:
- Community Colleges
- The University of Montana campuses ([Link](#)) Pg. 7
- Montana State University campuses ([Link](#)) Pg. 14
- 11:50 A.M. Discussion and Guidance
What is the relationship of campus' plans to BOR plans and policies?
- 12:15 P.M. LUNCH
- 1:00 P.M. BREAKOUT SESSION: Board Expectations for improving and clarifying its
work, and the work of the OCHE, MUS, and CAMPUSES. ([Link](#)) Pg. 21
1. System & Transferability
 2. Planning
 3. Campus Connections
 4. Legislative Relations
 5. Federal Relations
 6. Board of Education
 7. Self-Help Solutions
- 2:45 P.M. BREAK
- 3:00 P.M. GROUP REPORTS (10 minutes each)
- 3:30 P.M. BOARD EXPECTATIONS: Guidance for OCHE and MUS
- 5:00 P.M. BOARD ADJOURNS

The Montana University System: “20 Years in 10 Minutes”

Commissioner Sheila M. Stearns

July 12, 2006

The question of what was intended by the words Montana University System (MUS) are as old as the charters of the oldest units, written in 1893. The Montana Constitution of 1972 affirmed the intent of the state to have a System. To define it simply, a system of higher education has one governing and coordinating board for most public units that receive state funds. In Montana that is, of course, the Montana Board of Regents.

Note: the relationship of the community colleges is not described in the Constitution. They are affiliated with the Montana University System, codified in MCA 20-15-103 & 105. By law the governing boards of Montana’s three community colleges must accept the Board of Regents as the entity responsible for coordinating academic programs in the state of Montana. In return, the state of Montana each biennium appropriates state general funds to supplement the self-imposed district property tax levy and the tuition paid by students at the community colleges. The seven tribal colleges receive funds from the state of Montana (in small, fluctuating amounts over the years, primarily for non-beneficiary, mostly non-Indian students), but they have no formal connection to MUS.

Review of significant Board actions relating to strengthening a system approach to Montana higher education.

Since 1972, the Board of Regents has taken several extraordinary steps to strengthen the connections among Montana’s units of postsecondary education. This list could undoubtedly be expanded and debated, but from my perspective, eight significant System developments in the past 300 years include:

1. The 1987 move of the Colleges of Technology into the MUS.

The Board of Regents accepted statutory authority from the 50th Legislature to assume responsibility for the five vocational-technical schools in the cities of Billings, Butte, Great Falls, Helena, and Missoula. In the January, 2005, meeting of the Board, Regent Hamilton reminded her colleagues that other cities in Montana, such as Bozeman, chose not to make the financial investment (local mill levies) to create vocational-technical schools in the 1960’s. [Lewistown has an unusual but successful arrangement of funding a higher education center, facilitating for its region the offering of courses from all MUS units, primarily MSU-Northern.]

It was the vision of the late Rep. Gene Donaldson of Helena to bring the vocational-technical schools into the fold of the Montana University System. The school districts and MUS wrestled with the details, but with considerable legal work and good-faith cooperation, the unification was accomplished by July 1, 1987.

On a related note: There continues to be confusion and tension between the definition and status of what, in Montana, constitutes a College of Technology (stand-alone or within a four-year unit), and a Community College. At least one of the COT’s calls itself, at times, the community college for its region. This is unacceptable to the leaders of the three existing community colleges, who believe that name should be reserved for the units that assess a local mill levy from the community itself for the college’s operation.

2. *The 1988-1992 Project to Convert all units from Quarters to a Semester System.*

After years of hearing about the difficulties of transferring credits between units of the system that were either on the quarter-system or semester-system, the Board of Regents passed a tsunami-level policy decreeing that all units would convert to the semester system by autumn of 1992. Most students in the system were enrolled then as now in UM or MSU, both of which were on the quarter system. The change was accomplished by 19xx over the objections of many faculty and administrators, primarily for reasons relating to cost-benefit analysis and advantages for students in the quarter system having available a smaller variety of course choices.

The amount of work and resolve that this transformation required cannot be overstated. Except for Montana Tech and Western, all faculty members and departments had to completely redesign their curricula and reduce by one-third the number of classes offered. This also needed to be accomplished without impeding progress toward graduation for any student caught in the transition. The objective was accomplished, with the ultimate cooperation of every faculty member in the MUS. The adoption of a common calendar and semester-system undoubtedly improved the ease of transferring between units of the MUS, but to my knowledge, we do not have data that verify the level of difference that it made in easing transferability.

3. *Report of the Montana Education Commission for the Nineties and Beyond: "Crossroads: Montana Higher Education in the Nineties"*

In 1989 Governor Stan Stephens appointed a commission comprised of fourteen distinguished Montanans from all corners of the state. They met for one year, with citizens' meetings all over the state. The thirteen recommendations can be briefly summarized as follows: 1. Be clear about what students need to learn and truly assess that they are doing so. 2. Form a more fully integrated educational system, from kindergarten through graduate school. 3. Continue efforts to assure transfer of credits. 4. Develop and coordinate the use of telecommunications, distance learning technologies, and educational outreach. 5. Place enrollment limits on UM and MSU with higher admissions standards. 6. Expand research and public service programs to meet economic and community development needs. 7. Establish a long-range planning council to anticipate and plan for the state's future. 8. Manage and fund the state's units of higher education as a single unified enterprise. 9. Submit a single budget proposal to the legislature, with the BOR responsibility for allocating appropriations. 10. Establish a joint committee of regents and legislators to maintain effective communication between higher education and the legislative branch. 11. Fund Montana institutions at no less than the average of peer institutions. 12. Outline a five-year program to restore adequate funding for the higher education system, and 13. Restore the policy of providing 65% of per-student instructional funding for Montana's community colleges.

4. *Restructuring - 1994.*

In the next huge reorganization of the MUS, the Board created two sets of campuses for administrative purposes, with the west campuses reporting to the Board of Regents through the president of the University of Montana, and the east campuses reporting to the Board through the president of Montana State University. Each unit remains

separately accredited by the Northwest Commission on Schools and Colleges, and each faculty retains responsibility for its curriculum. Administrative practices became interconnected to varying degrees, more so among the UM campuses than the MSU campuses according to some observers. The restructuring was reviewed by a consultant, (James Mingle, in 2000) who made recommendations for improving outcomes, at least a few of which were considered or implemented. Attached to this document is the final version of a matrix prepared by former Deputy Commissioner Joyce Scott on the progress of MUS toward the objectives, and a document with comments from current OCHE staff.

An obvious benefit of restructuring was the development of a sense of shared responsibility among the units of the affiliated campuses which resulted in far more resource sharing and communication among units in their own sphere of campuses. A downside for smaller campuses is the insertion of another level of governance by a powerful and competing campus. A downside for some on the two largest campuses is that the attention of their presidents is distracted and diffused among other units. Also, resources that would previously have stayed on their campuses apparently had to be shared with smaller competing campuses.

Academic leaders on all campuses have the sense that, from time to time, other campuses in the system have a tendency to expand the mission beyond the resource base, or in ways that compete for students and for programs. In other words, it is not a perfect world. Arguably, for all its flaws, the restructuring created alliances and collaboration that contributed more to a system approach than could possibly have occurred without such a reorganization. Unfortunately restructuring did not create a significant increase in collaboration between the two doctoral-granting research universities, or between what some call the two sub-systems. This is debatable, of course, but at whatever level it remains true, it presents a challenge worth further discussion by the Board.

5. 1995 Decision by the legislature to convert to lump sum appropriations to the Board of Regents for the MUS educational units.

In 1995, the Legislature adopted the current "lump sum" appropriation policy for the educational units of the Montana University System and most of the Office of the Commissioner of Higher Education to allow more budget management flexibility and, as a result, enable the Board of Regents to manage the Montana University system as a system. The Postsecondary Education Study Committee originally proposed this appropriation policy for the Montana University System to the 1991 legislature. An important component of that recommendation was to require a higher degree of accountability from the MUS in the form of long-range plans, clearly articulated annual goals, annual progress reports, and an outcome assessment program.

6. Restructuring of the Montana University System (Phase Two)

The Board approved a resolution on July 6, 1995, called Phase Two of Restructuring. The goals of Phase Two, briefly stated, were: 1. Getting in; 2. Getting through; 3. Getting a job; and 4. Paying the way. The document contains recommendations such as: raising of entry standards to all MUS four-year campuses and introduction of proficiency-based entry criteria; implementation of a common, system wide, course-

numbering system, and c. elimination of unit role and scope statements – to name just three. The last formal report to the Board on restructuring was presented by former Deputy Commissioner Joyce Scott on March 6, 2002, and is attached.

7. Adoption of Common Data Management Software in 1997.

As the need for accountability and assessment became ever more obvious, the Board of Regents determined that the UM and MSU campuses should adopt the same data administrative management product. Although some sectors preferred the *People Soft* product, ultimately the SCT/Banner system was selected. The MUS worked with the State to make sure the finance data elements were consistently defined with the State's *People Soft* product. The campuses collaborated with OCHE and SCT to develop a student data warehouse and enrollment report system. Until very recently (March 2006) the use of the data warehouse has been hampered by the lack of a full-time, experienced professional in managing and analyzing the data that was collected.

Still, even with the common Banner software in 1997, the UM and MSU campuses developed different ways to report financial data. OCHE staff cannot retrieve some of the data they need for mandatory reports except by asking for reports from the campuses. They have difficulty receiving data in comparable spreadsheets. The Board observed the differences in financial reporting at its meeting in Billings in May of 2005. A group has been working since that time to improve and synchronize the collection and reporting of financial data.

Note: the UM and MSU campuses still, at times, make resource-intensive decisions for separate systems, as they did with the selection of different electronic library catalog systems in circa 2000.

The need for consistent data is ever more obvious in the areas of human resources, finance, and course transfer and articulation. Some products to enhance system wide commonality and management are available from Banner, but not inexpensively, and not without debate about campus preferences for modifications. As most people understand by now, the largest challenge, as with semester conversion, is the immense investment of personnel time, administrative and academic, to accomplish any of these transitions, particularly those relating to easily transferable courses.

8. Board of Education Committees

Since 2002-2003 the Board of Education has appointed and utilized, with varying degrees of success, committees in four areas: a) P-20 education; b) Indian Education for All; c) Unified budget; and d) Planning and Evaluation. The committees have tackled topics such as accelerated learning and dual enrollment, proficiency exams, alignment and assessment. Governor Schweitzer has taken a keen interest in issues ranging from all-day kindergarten to transferability and affordability. Renewed emphasis in these areas should be expected throughout his administration.

9. The Shared Leadership Process and Initiatives.

In 2003, when state and system leaders looked at ways that the MUS could contribute more powerfully to Montana's economic development, the Board authorized an initiative named "Shared Leadership." In March 2004, a joint meeting of the legislative interim

Post-Secondary Policy and Budget Committee (PEPB) and the Board of Regents voted to focus on three initiatives:

- Access -- increasing the numbers of Montanans with the mentoring, motivation, and means to attend and succeed in college, two-year or four-year;
- Distance Learning -- easing the way for Montanans to enroll in classes delivered non-traditionally, either in person by traveling faculty or, increasingly, via e-learning of some kind but primarily internet-based, and
- Workforce Development -- increasing the development by all the units, particularly two-year, of academic programs needed by Montana employers with vacancies in high-wage jobs.

The meaning of Shared Leadership, as it developed among the citizens-leaders who served on the committees, could also be described as shared responsibility for the above three initiatives among MUS, state government, and the private sector, including nonprofit, non-governmental organizations (NGO's). Work on these initiatives continues, with citizen advisors who meet periodically.

All three initiatives are more likely to improve or succeed with system-oriented approaches. For example, the Distance Learning citizens' group strongly recommended, in 2004, establishing leadership at the system level for coordination delivery of electronic courses, programs, and degrees across and around the state. The 59th Legislature (2005) funded this initiative for two years, with a 2007 sunset. Preliminary findings are that MUS campuses are even more disparate than expected in terms of platforms, pricing, faculty compensation, course ownership, and transferability of e-courses and programs. There is much work to be done, but the direction that system oversight might take is worrisome, to say the least, to those campuses with the most investment, to date, in e-learning.

10. Transferability Performance Audit

The 2004 legislative performance audit has increased efforts throughout the University system to make transferring between units much easier and less expensive in terms of MUS administrative and academic requirements, and more transparent to the students in terms of what can transfer and what cannot. Many existing policies and previous efforts, such as semester conversion, made progress toward systematic ease of student transfers. The Schweitzer administration shares the Board and the Legislature's high priority for this issue, and has indicated that it will support increased funding for a higher level of performance by the University System in this "systems" issue.

**THE STRATEGIC DIRECTIONS
FOR THE UNIVERSITY OF MONTANA
Missoula, Montana
2004-2009**

The University of Montana's Strategic Directions rest firmly upon the revised statement of Strategic Directions for the multi-campus University (Revised 2004) and the vision, mission, and goals of the Montana University System as articulated by the Board of Regents. These chart the course for the University during the next five years.

Mission Statement

The University of Montana pursues academic excellence as demonstrated by the quality of curriculum and instruction, student performance, and faculty professional accomplishments. The University accomplishes this mission, in part, by providing unique educational experiences through the integration of the liberal arts, graduate study, and professional training with international and interdisciplinary emphases. The University also educates competent and humane professionals and informed, ethical, and engaged citizens of local and global communities; and provides basic and applied research technology transfer, cultural outreach, and service benefiting the local community, region, State, nation, and world. (Revised November 2004)

GENERAL GOALS

- Engage groups and constituencies on and off campus;
- Cultivate and project a service attitude and orientation;
- Refine the budget planning process and develop an all-funds budget;
- Involve all sectors of the University in the planning processes; and
- Implement fully the Quality of Worklife Program.

FINANCIAL GOALS

- Develop and implement a financial plan to accommodate the programs, staffing, and facilities by 2006;
- Increase student financial assistance for students from various sources by \$5,000,000 annually by 2007;
- Index mandatory student fees by 2006;
- Implement and complete a campaign in partnership with the Foundation to raise \$100,000,000 by 2007;
- Develop a strategy to raise faculty, staff, and administrative salaries to peer averages by 2007;
- Increase Library staffing, and acquisitions budget to meet needs by 2007;
- Increase Operation and Maintenance expenditures to the level required to maintain the facilities by 2007;
- Increase funded research to \$100,000,000 in new awards annually and indirect cost recoveries to 40 percent;
- Identify and pursue federal appropriations to build institutional capacity;
- Pursue technology transfer and business incubation;
- Identify auxiliary and other contributions to the University bottom line;
- Implement a joint venture to construct a planned community on University property by 2006;
- Implement a joint venture to create new undergraduate colleges in China by 2006;
- Continue facilities development and renovation in response to programmatic requirements;
- Seek State matching of federal research grants and private support for facilities; and
- Identify annual reductions to the operating budget through "best practices" for

internal reallocation.

ACADEMIC GOALS

- Identify new academic programs at all levels (certificate through doctoral) in response to identified needs;
- Implement a staffing plan to accommodate existing and new programs by 2006;
- Double the number of graduate assistants and double the stipend levels in regular increments by 2009;
- Involve upper division undergraduates in research and creative activities by 2008;
- Enhance service learning by 2007;
- Extend existing and new programs through information technology to clientele with needs by 2006;
- Complete implementation of a comprehensive outcomes assessment program for academic planning by 2007;
- Develop a plan for proficiency-based graduation by 2007 for implementation in 2009; and
- Continue the schedule for the review of all programs – including centers, institutes, and other special entities.

STUDENT GOALS

- Refine admissions standards for proficiency-based admissions for implementation in 2009;
- Implement recruitment strategies to maintain stable enrollment of 15,000 head count students by 2007;
- Reduce freshman attrition rate to no more than 20 percent by 2006;
- Increase five-year graduation rate by 10 percent by 2007; and
- Expand and diversify study abroad opportunities and involve at least one-fourth of the undergraduate students.

PROGRAMMATIC GOALS

- Establish the Endowed Chair in Cardiovascular Sciences by 2007;
- Establish the Endowed Chair Neural Science by 2007;
- Develop the Mansfield Center joint training venture with the All-China Youth Federation by 2006;
- Establish the Endowed Chair in Limnology at the Flathead Lake Bio Station by 2007;
- Establish the Endowed Craighead Chair in Wildlife Biology by 2007;
- Establish Endowed Chairs in Accounting, Business Admin, Entrepreneurship, and Management by 2007;
- Establish Endowed Lectureships in at least five areas by 2007;
- Establish the Kittredge Chair in Nature and Creative Writing by 2007; and
- Establish the Executive Development Center in Business Administration by 2007.

FACILITIES GOALS

- Construct and equip Anderson Hall, Skaggs Addition, Law Addition, and Native American Center by 2007;
- Construct or lease Life Science Building by 2008;
- Construct Forestry Building by 2009;
- Rehabilitate Oval by 2007;
- Construct and equip Education Annex by 2008;
- Restructure information technology campus infrastructure by 2007;
- Complete deferred maintenance by 2009;
- Renovate Sky Boxes and Press Box by 2007; and
- Expand Stadium as needed by 2007.

Strategic Goals for The University of Montana Western 2006 Strategic Plan (Draft)

The strategic plan of Western Montana College of The University of Montana rests firmly upon the revised statement of Strategic Directions for the multi-campus University (Revised 2004) and the vision, mission, and goals of the Montana University System as articulated by the Board of Regents. These chart the course for the University during the next five years.

Mission Statement

The University of Montana-Western provides innovative interdisciplinary education through experiential learning that combines theory and practice. Western serves citizens of all ages with its academic, community-service, and lifelong-learning programs. As part of the global community, Western encourages diversity, international awareness, environmental responsibility, and mastery of technology as a gateway to the world.

Strategic Goals

Following are the approved goals of Western's new Strategic Plan. The Western community under the direction of the Chancellor is currently winnowing and refining the many pages of strategic objectives listed under each goal before finalizing the plan this fall.

- Improve undergraduate education through continuous assessment and enhancement of Montana Western's academic programs.
- Provide a more stable financial environment through enhanced resource acquisition and strategic management, integrated marketing and effective distribution of resources.
- Increase enrollment, affordability, access and academic quality through enhanced recruiting, persistence and retention of good-fit students and raise graduation rates through improved student success and learning.
- Attract, retain, and support an excellent faculty and staff.
- Enhance successful development, maintenance, and improvement of the physical plant/facilities in accord with long range development plans.

MONTANA TECH STRATEGIC PLAN 2006

*The strategic plan of **Montana Tech of The University of Montana** rests firmly upon the revised statement of Strategic Directions for the multi-campus University (Revised 2004) and the vision, mission, and goals of the Montana University System as articulated by the Board of Regents. These chart the course for the University during the next five years.*

Mission Statement

Montana Tech of The University of Montana is a comprehensive university emphasizing science and engineering with a national and international reputation for excellence. Programs range from occupational through graduate levels in engineering and selected other fields. The campus is dedicated to assisting students attain success in their academic, professional, and individual life goals. A personalized set of support services is available to all students. Students study in a learning environment that stresses practical, hands-on experiences and internships. Montana Tech programs are designed to produce graduates who are well-rounded, competent, responsible, and ethical professionals.

1. Montana Tech Strives to: SUSTAIN AND ENHANCE THE QUALITY OF ALL ACADEMIC PROGRAMS

Montana Tech seeks to accomplish this goal through:

- Continuing to develop and maintain a world-class faculty and staff.
- Supporting excellence in instruction and student learning.
- Strengthening Montana Tech's role in the development and application of the technologies of the twenty-first century and the core programs that support them.
- Developing the curriculum to address the nation's economic needs as articulated by industry and national professional societies.

2. Montana Tech Strives to: ENHANCE RESEARCH AND SCHOLARLY ACTIVITIES

Montana Tech seeks to accomplish this goal through:

- Providing incentives to successfully engage in competitive research and scholarly activity.
- Improving communications to faculty regarding research opportunities and procedures.
- Improving the state, regional, and national recognition of faculty and staff.
- Providing students with opportunities to engage in research technology development at the undergraduate and graduate level.
Developing an equitable and sustainable financial model to support the campus research infrastructure.
- Expanding collaborative research agreements with national and international institutions of higher learning to enhance our effectiveness in obtaining funding and broaden the educational experience available to our students.
- Identifying key technologies of the new century and evaluating the opportunities for new research directions.

MONTANA TECH STRATEGIC PLAN 2006

3. Montana Tech Strives to: PARTNER WITH INDUSTRY IN ECONOMIC DEVELOPMENT

- Montana Tech seeks to accomplish this goal through:
- Enhancing ongoing support and identifying opportunities to support new and expanding companies.
- Providing a central focus at Montana Tech to support regional economic development efforts.
- Increasing opportunities for development and support of existing professionals within the community.
- Using flexibility in the development of programs to meet the needs of a changing workforce.

4. Montana Tech Strives to: ELEVATE PUBLIC AWARENESS OF THE HIGH VALUE AND QUALITY OF MONTANA TECH

Montana Tech seeks to accomplish this goal through:

- Establishing a comprehensive long-term approach to market and institutional research.
- Marketing the institution comprehensively in select markets.
- Establishing and maintaining brand consistency in all external and internal communications.
- Increasing alumni involvement.
- Increasing development and institutional advancement results.
- Improving public awareness and recognition of the campus service mission through outreach and marketing.

5. Montana Tech Strives to: ENHANCE EDUCATIONAL ACCESS AND OPPORTUNITIES

- Montana Tech seeks to accomplish this goal through:
- Increasing scholarship support.
- Increasing the diversity of students.
- Developing more national and international exchange opportunities.
- Increasing student opportunities for higher education through utilization of the College of Technology.
- Increasing the opportunities for access to alternative delivery of education.
- Providing cultural opportunities for Montana Tech students.

6. Montana Tech Strives to: INCREASE THE ENROLLMENT TO 2540 BY 2010

- Montana Tech seeks to accomplish this goal through:
- Improving the effectiveness of recruiting.
- Increasing retention rates from enrolled/attended through goal achievement.
- Sustaining the excellent record of placing graduates, while increasing placement in career-related employment.

The University of Montana-Helena College of Technology Strategic Plan

*The strategic plan of **Helena College of Technology of The University of Montana** rests firmly upon the revised statement of Strategic Directions for the multi-campus University (Revised 2004) and the vision, mission, and goals of the Montana University System as articulated by the Board of Regents. These chart the course for the University during the next five years.*

Mission

The Helena College of Technology of The University of Montana is a two-year institution of higher education dedicated to meeting the varied educational needs of individual students, business and industry, and the Helena community. As one of the four campuses of The University of Montana, UM-Helena is committed to its mission as a comprehensive technical college, providing high-quality programs and services in workforce training, university transfer preparation, and lifelong learning.

Strategic Directions and Priorities, 2006-2011

Student Success

Direction: UM-Helena develops and offers instructional programs and student services that help students succeed in reaching their goals.

Priorities for action:

- Assist students in balancing life and school demands.
- Provide transition services for students from application through graduation.
- Develop and evaluate quality educational programs.
- Increase access to student resource areas for the varying student populations.

Connect with the Community

Direction: UM-Helena builds connections with a broad range of groups to respond to the diverse needs of the communities we serve.

Priorities for action:

- Work collaboratively with business and industry, local and state governments, community organizations, and educational partners to accomplish common goals for statewide economic development.
- Create communication avenues with the surrounding community.
- Fully develop internships and service learning opportunities for students.
- Identify and incorporate community interests/ business and industry needs in future planning.
- Foster faculty, staff, and student involvement in community organizations and events.

Create Access

Direction: UM-Helena makes access to higher education possible for the communities we serve.

Priorities for action

- Develop alternative delivery methods for courses and degree obtainment including distance learning, evening and weekend offerings and collaboration with other educational institutions to enhance access to higher education.
- Lessening the financial burden of higher education through the development and marketing of scholarship opportunities.
- Improve access and services to people with disabilities.

Develop Resources

Directions: UM-Helena proactively develops its fiscal, capital, technological and human resources to ensure the effective, efficient management of quality programs and services.

Priorities for action

- Improve technological infrastructure and services including electronic mail, wireless networks, and computers.
- Develop criteria for managing enrollment to sustain the quality of our programs and services including marketing and development.
- Develop staffing and salary structure plans.
- Expand the college's fiscal resource base through grants, private funding, and entrepreneurial activities that support college priorities.
- Develop public/private partnerships and corporate sponsorship and in-kind donations.
- Promote legislative awareness and support.
- Support the excellence and growth of college faculty and staff members through professional development programs.

MSU Bozeman Five Year Vision

Montana State University Bozeman Vision Statement:

Montana State University will be the university of choice for those seeking a student-centered learning environment distinguished by innovation and discovery in a Rocky Mountain setting.

Montana State University Bozeman Mission Statement:

The mission of Montana State University is:

- To provide a challenging and richly diverse learning environment in which the entire university community is fully engaged in supporting student success.
- To provide an environment that promotes the exploration, discovery, and dissemination of new knowledge.
- To provide a collegial environment for faculty and students in which discovery and learning are closely integrated and highly valued.
- To serve the people and communities of Montana by sharing our expertise and collaborating with others to improve the lives and prosperity of Montanans.

In accomplishing our mission, we remain committed to the wise stewardship of resources through meaningful assessment and public accountability.

If we are successful, what will MSU Bozeman be like in five years?

I. Student Body

MSU Bozeman will enroll approximately 13,000 headcount students.

Approximately 27% of these students will be nonresidents.

We will increase graduate enrollment to approximately 14% of the student body.

The student body will be more diverse than it is today.

The number of international students will increase to 500.

Incoming freshmen will be better prepared than they are today.

The Fall-to-Fall retention rate of our incoming freshmen students will increase to 75%.

II. Faculty and Staff

MSU Bozeman will its competitive status as an employer.

MSU Bozeman will offer competitive faculty and staff compensation packages.

Faculty and staff will have increased access to professional development programs.

A growing proportion of the faculty will have a global perspective on their disciplines.

III. Curriculum

MSU Bozeman will be nationally recognized as a leader in the integration of learning and discovery at the undergraduate level.

MSU Bozeman will have graduate programs that are nationally recognized for research and teaching excellence.

IV. Research and Creativity

We will have grants and contracts activity in excess of \$130 million.

V. Partnerships and Outreach

The four campus MSU family will be more integrated.

The College of Technology – Great Falls will have a stronger presence on the Bozeman campus

VI. Physical, Technological, Financial and Service Infrastructure

MSU Bozeman will have well developed and integrated processes for capital and land use planning that support and complement the University's Mission and 5-Year Vision.

The Montana State University-Billings strategic plan for FY2005-FY2010 focuses on university and statewide leadership, academic excellence, student services and administrative service.

University and Statewide Leadership: A review of quality indicators data reported to OCHE helps MSU-Billings administrators and deans gauge progress. Advances are planned in these areas:

- **Access and Affordability** — Differential tuition for the two-year campus provides access to more students. Tuition and cost controls must be addressed to maintain affordability of four-year programs.
- **Workforce Development** — Continued growth at the College of Technology and Professional Studies and Lifelong Learning. The Downtown campus will focus on non-credit worker training.
- **Distance Learning** — Continued growth and controlled costs in MSU-Billings Online to serve students across Montana. Over 68% of the instructors are full-time faculty.
- **Public/Private Partnerships** — Continue advancements in partnerships that have been key to development of new academic programs (e.g., process plant technology and construction trades).
- **Community and University Stewardship** — Increase endowed scholarships and faculty support; pursue land acquisition to allow growth in programs; develop family student housing; develop a day-care facility at the College of Technology; and ramp up its transition to a true community college.
- **Integration of the University into the Community** — Increase involvement in, become a reliable resource for and strengthen relationships with city government, county government, school districts, economic development agencies and nonprofit leaders.
- **Regional/Statewide Expertise** — Advance an education and research agenda in areas that directly affect the economic growth of the community and state (e.g. trades and technology, health care, life sciences research, bioscience research, and biotechnology and energy development).

Academic Excellence: Focus on developing a student centered culture that emphasizes excellence and integrity through assessment and accountability.

- **Curriculum** — Enhance and strengthen the quality of all certificates and programs; fully integrate Indian Education for all in all undergraduate programs. Explore niche and other programs to serve changing population needs.
- **Technology** — Integrate instructional technology that improves teaching, learning and assessment.
- **Access** — Improve transferability of credits, dual enrollment and articulation between colleges.
- **Civic Leadership** — Increase programmatic partnerships and involvement with MAS and ASMSU-B; growth in civic engagement.
- **Program Development** — Introduce/develop new certificate, two year, four year and graduate programs to meet the community and work force needs. Examples: Native American studies/center; urban/leadership studies (specifics found on the future programs webcast). Creation of urban, leadership and Native American institutes.
- **Experiential Learning** — Expand workplace experience, service learning, cooperative education internships.

- **Research and Scholarship** — Expand the research agenda to compliment the institution's mission.

Student Affairs: A strategic plan for Student Affairs was updated in the spring of 2005.

- **Student Success, Achievement and Retention** — Improve the focus of enrollment management through integrated and strategic marketing.
- **Access, Affordability and Stewardship** — Ensure delivery of essential student and financial services, develop transfer and course equivalency guides.
- **Academic Excellence and Integrity** — Enhance availability and effectiveness of academic advising through the Academic Support Center and the Advising Center and faculty advisors. Develop a student centered technology environment to support services and learning.
- **Technology** — Develop a student centered technology environment to support services and learning.
- **Competitive Change** — Develop innovative strategies to increase recruitment and retention of students.
- **International** — Increase study abroad programs for students and exchanges for faculty.
- **Inclusiveness and Diversity** — Enhance services to meet needs of diverse student population.
- **Experiential Learning** — Expand workplace experience, service learning, cooperative education and internships.
- **Civic Leadership** - Increase opportunities for students to enhance student learning through participation in community service, service learning and civic engagement.

Administrative Services: Strategic plans for FY06-07 include:

- **Accountability** — Continued collaboration with OCHE, Montana University System Units, Governor's Budget Office, and Legislative Fiscal Division for budget development and excellence in financial management.
- **Leadership** — Collaborate for training on business procedures; actively participate in the Business Process Review to identify and implement best business practices.
- **Stewardship and Service** — Review and enhance internal controls to safeguard University assets; make continued utilization of Banner functionality; increase internal audit activities.
- **Infrastructure Excellence** — Develop and follow through on the Long-Range Building Program. Develop and implement plans for new science labs, energy savings programs, allied health facilities, etc.
- **Technology** — create an electronic business environment using the Luminis Portal, Banner and third-party systems.
- **Data support** — Use data warehouse to guide and enhance campus decisions.
- **Networking** - Enhance campus network infrastructure to support next generation extreme networking and research.

Challenges/Opportunities: Competitive salaries for faculty and staff; affordability; keeping educational pathways for students accessible and relevant; declining and a rapidly-aging population; cultural and other demographic changes in the community and region will be major issues for MSU-Billings.

Montana State University-Northern Summary - Master Planning 2006

Needs Assessment: In Spring 2001, Montana State University-Northern conducted a comprehensive market study. The general conclusion of Northern's situation as a result of the market study findings were as follows:

MSU-Northern is truly at a crossroads. With declining enrollments, increased challenges from peer institutions more aggressive in their recruitment and marketing efforts, the declining demographic forecast for college-age students in Montana, enrollment-driven funding formulas in higher education, and the increased focus of constituents on self-supporting financing and student outcomes, MSUN must undertake a proactive approach in order to ensure its viability and even its very survival. The study concluded three priority areas must be addressed. The campus must focus on the recruitment of new students, develop a master plan, and invest in the infrastructure with a focus on residence life.

Master Plan: In the Spring 2002, MSU-Northern completed a planning process that resulted in a framework to guide the operations of the educational and administrative infrastructure of the university for the next three to five years. The implementation of this Master Plan was to shore up the university's mission and develop a sense of intention and unity by demarcating Northern's role in the education of citizens in the region and state; articulating educational and operational priorities; implementing key strategic initiatives that will effectively position Northern; and providing for a university-wide level of organizational support for this new direction.

During AY 2005, an assessment of progress towards the strategic initiatives (Campus Community, Partnerships, Campus Life, Educational) was conducted. The assessment showed that several of the Campus Life initiatives were either completed or in the progress. The Campus Community initiatives were partially completed and the partnerships initiative still needs to be implemented. The Educational initiative was too vague to conduct an assessment. As a result, an extensive Academic Plan (<http://www.msun.edu/admin/provost/Reports/academicplan2.pdf>) was developed during AY 2006.

Mission Statement:

A comprehensive regional university, MSU-Northern offers programs of professional preparation in teacher preparation; mechanical and engineering technologies; business and computer information systems; nursing; and arts and sciences.

MSU-Northern applies emerging technologies in degree programs ranging from the associate to master's level. MSU-Northern prepares well-educated students who are capable of decisive action and application of new ideas. The university is committed to excellence in teaching, service to its region and the State, and applied research and scholarship.

MSU-Northern values individualized attention to its students, experientially-based learning, and creating a culturally rich and intellectually stimulating environment. From its North Central Montana high plains main campus, the university serves as a regional cultural center and maintains strong partnerships with communities, education, business and industry.

MSU – Great Falls College of Technology Summary of Strategic Plan, 2005 - 08

Using the needs assessment conducted for the Montana Board of Regents by Dennis Jones of NCHEMS, MSU – Great Falls developed its strategic plan for 2005 – 08. Key components follow:

Vision

In the next fifteen years, MSU – Great Falls will play a leading role in transforming communities, economies, and lives in North Central Montana. It's a transformation that must occur. If current trends continue as projected, by 2020, Great Falls, Montana, once the largest and most prosperous of Montana's cities, will be a shadow of its former self. The surrounding region will live in the penumbra of that shadow.

The vision directing MSU – Great Falls' strategic plan is actually an "anti-vision." MSU – Great Falls' is working to create a future in which those projections don't come true – a future transformed by the programs, services, and amenities of its College of Technology and Higher Education Center. In this strategic plan, MSU – Great Falls charts the path for that transformation, one that ensures that Great Falls and North Central Montana will attract and retain young professionals; promote thriving and desirable sectors of the new economy; serve a broad range of learning interests for a broad range of learners; and provide a stimulating intellectual, cultural, and recreational milieu for all who live here.

Goals and Strategies

To realize this vision, MSU – Great Falls must:

1. **General and Targeted Enrollment Growth.** Attract more learners, particularly among targeted populations currently under-enrolled in higher education:
 - Raise awareness of educational opportunities available through MSU – Great Falls;
 - Attract more high school students through recruitment, dual enrollment, and K-12 partnerships;
 - Increase participation of nontraditional students, especially working adults;
 - Increase participation rate of seniors, retirees;
 - Create/improve programs and services to increase participation rate of Native American students;
 - Broaden the offerings through the Higher Education Center at MSU – Great Falls;
 - Deliver programs in ways that increase participation of regionally distant learners; and
 - Increase the affordability of higher education pursuits through partnerships with industry.

2. **Quality.** Design and deliver high-quality learning experiences ensuring that more people attain a credential that will lead to a better way of life:
 - Promote and reward teaching excellence through a Center for Excellence in College Teaching;
 - Ensure that academic advising is consistent, accessible, and effective;
 - Develop curriculum that supports student success by finding measures that accurately assess students readiness for high-attrition courses and by improving students' preparation;
 - Expedite students' progress in higher education by working to standardize courses, align AAS and certificate programs in similar disciplines, and implementing a healthcare core; and
 - Document competencies and reinforce the value of endorsements, certificates, and degrees.

3. **Responsiveness.** Create programs and services that are clearly and continually aligned with the learning needs and interests of the community, the workforce, and individual learners:
 - Ensure that academic offerings are linked to prioritized workforce needs;
 - Develop MSU-Great Falls as a source of intellectual and creative growth in the community; and
 - Respond to workforce needs in the Gallatin Valley through expanded technical programming.

4. **Efficiency.** Steward resources to protect affordability and ensure accountability:
 - Consolidate and make better use of information technology resources to improve efficiencies;
 - Improve understanding of and participation in the budget process;
 - Streamline business processes;
 - Coordinate disaster recovery and business continuity processes with other campuses;
 - Use Banner capability to revise the faculty workload processes; and
 - Pilot e-portfolios for the Tenure and Promotion process.

BOARD EXPECTATIONS

July 2006 Planning Questions and Possible Directives

1. Operationally and philosophically, what does the Board of Regents intend by the word System in “Montana University System?”

BOARD EXPECTATION: (DRAFT)

The Board of Regents believes that the Montana Constitution intends for the Board to govern and coordinate the units in such a manner that all administrative and organizational services that can be the same, are the same, (or very similar), for the sake of cost-control and accountability.

The Board approves and applauds unique approaches among institutions consistent with their distinct missions, history, character, tradition, and separate accreditations, provided that the unique approach does not inhibit efficient, substantive collaboration among the units in all possible ways for the benefit of Montana students in general and the state of Montana as a whole.

This philosophy would increase expectations for substantive collaboration, some of which already occurs among many groups (fiscal officers, chief information officers, chief academic officers, just to name a few). The presumption would be that academic and administrative leaders would not just communicate, but would also seek common approaches across the System on academic and administrative endeavors and initiatives, unless the function or program truly is unique to a particular institution.

The Board supports funding for faculty councils to ensure academic collaboration across diverse, autonomous faculty governing bodies. The Board expects that the Commissioner, Presidents, Chancellors, Deans, and all campus leaders will accelerate the movement toward common, comparable, or cooperative approaches including, but not limited to:

- Common and integrated administrative and business services and technology;
- A comprehensive and system-wide approach to the transferability of courses throughout the Montana University System, using faculty program councils to determine the content, learning outcomes and perhaps even the course numbers for those courses. This expectation, more than any other, is the real measure of the kind of collaborative, integrated system that the Board of Regents expects the Montana University System to become. Therefore, the Montana Board of Regents expects every member of the Montana University System to make a good faith commitment to this effort.
- Distance learning policies, fees, and technology;
- A stream-lined admissions process for the Montana University System, using the “single admissions file” policy and the effectiveness of that policy as a starting point;
- Common formats and software systems used for reporting financial, student, and assessment data.

2. What does the Board of Regents mean by “planning” in the Montana University System?

BOARD EXPECTATION (Draft):

The Board of Regents believes that planning at the campus level should reflect the

strategic priorities of the Board, and should incorporate or reference goals related to academic programs, student services, finance, technology, and facilities. The Board also believes that representatives from other campuses should be invited to participate in planning (establishing or reinforcing diplomatic relations among campuses), and that the format and framework of campus plans should move toward reasonable comparability, for purposes of Board analysis and accountability.

3. What is the current interpretation by the Board of Regents of the responsibilities of the Commissioner and the Presidents of the UM and MSU campuses, particularly in regard to administrative/executive supervisory relationships and responsibilities?

BOARD EXPECTATION (Draft):

The Board stands behind the direction of 1994 in which the presidents of UM and MSU became the chief executive officers of a set of campuses. The presidents are expected to take high-level responsibility for the welfare of all the campuses under their supervision, without favoritism toward the campus on which they also serve as campus executive officer. The Presidents will continue to be held accountable, if anything to a higher and stronger standard, for the success of the campus executive officers who report to them, and through them, for the well-being and success of the campuses under their joint leadership. The Board expects that the Commissioner will ensure that the reporting lines are clear, and will promote communication among the campus executives that is substantive, systematic, collegial, and productive. The Board expects the Commissioner to explore whether Recommendations #1 - #3 of the Mingle Report (November, 2000), should be reconsidered for implementation. In brief, they are: to develop explicit guidelines in a formal Memorandum of Understanding "between the Universities and their affiliates, which [will be] reviewed annually by the parties...and 2. "...part of the formal evaluation of senior institutional leaders on the campuses."

4. What is the current expectation of the Board of Regents in regard to legislative relations?

BOARD EXPECTATION (Draft):

The Board of Regents expects that the campuses and agencies of the Montana University System will present the Board's unified budget and agenda to the legislature, under the direction of the Commissioner. For those independent subsets of the University System which work closely with the Office of the Commissioner on behalf of their constituencies (such as campus lobbyists, alumni associations, student associations, community colleges), the Commissioner should negotiate memoranda of understanding that specify and emphasize common goals, and protocols for clear communication when goals diverge. Divergence does not happen frequently, but it does happen.

5. What is the current expectation of the Board of Regents in regard to research and federal relations?

BOARD EXPECTATION (Draft):

The Board of Regents recognizes that each campus has unique needs and areas of policy or research excellence. The Board also recognizes that federal agencies and members of Congress have differing priorities and policy objectives in providing funds. The Board does not expect the Office of the Commissioner to direct or control the solicitation of competitive research grants by departments or faculty on the Montana University System campuses. The Board does expect the Office of the Commissioner

to ensure that individual campus have consistent policies related to federal grants and research, and that system priorities are reflected in communications with our federal delegation and federal agencies. The Commissioner's Office should ensure:

- Requests for federal funds are shared, in advance, with all campuses and the Commissioner's Office;
- UM and MSU campus systems work collaboratively with the Commissioner's Office and Board to prioritize funding requests for the university system;
- All funds used for federal relations work are spent, and accounted for, in a permissible, consistent, and transparent manner;
- All campus policies related to conflict of interest management, royalties, patents & licensure, and employee participation in private businesses are either consistent, or necessarily divergent, and that when possible conflicts of interest arise, that chief legal counsel of the OCHE must be informed; and
- Each federal funding request is consistent with, and supportive of, individual campus and Board of Regent strategic goals.

6. What is the Board's intention for OCHE and the campuses with regard to Board of Education priorities such as progress on P-20 issues and Indian Education For All?

BOARD EXPECTATION (DRAFT):

The Board of Regents expects that all campus leaders and academic faculty and staff will be aware of, and assume an appropriate share of MUS responsibility to meet the goals of the P-20 and Indian Education For All committees of the Board of Education. The Commissioner of Higher Education will be responsible for communicating requests, needs, and expectations of the BOE committees to campus leaders. The campuses will report annually to the Commissioner on progress and developments on their campuses related to these two important areas of joint emphasis with the public schools of Montana. These reports are essential for responding to semi-annual requests from the Governor and the Legislature in regard to MUS progress in these areas. The reports are due from the Board of Regents to the Board of Education in January and July of each year.

7. What does the Board envision in terms of longterm self-help solutions to campus financial challenges?

BOARD EXPECTATION (DRAFT):

- The Board expects campuses to continue successful private fundraising for scholarships and selected capital projects.
- The Board expects campuses to work with the Commissioner, and community and legislative leaders to increase state support to reduce dependence on tuition.
- The Board expects campus executives to develop concepts for entrepreneurial private-public partnerships, with prior planning and implementation subject to approval by the Board.