

Montana University System

Board of Regents'



Approved: July 2006
Updated: 2019

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



MONTANA UNIVERSITY SYSTEM Strategic Plan 2019

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MONTANA UNIVERSITY SYSTEM

Strategic Plan

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.



The Regents' Workgroup on Reform and Reinvention recommend the following improvements to the MUS planning process.

Planning Process

The Board of Regents is committed to a biennial planning and review process that includes a broad array of University System stakeholders.

At the beginning of each biennium the MUS will hold a comprehensive planning meeting with representatives from MUS constituencies throughout the state. The goal of the meeting is to conduct a biennial review and update to the MUS Strategic Plan, including:

- review of key outcome measures and performance indicators;
- revisions and updates to strategic goals; and
- development and review of strategic initiatives

MUS Strategic Plan

Guiding Principles

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

Systematic

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

Accountable

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

Inclusive

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

Flexible

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

Campus Connected

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

Statewide Focus

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

National Context

National trends and initiatives will be considered throughout the planning process and aid in the development of strategies and initiatives.



MUS Strategic Plan

College Participation

Goal 1: Access & Affordability

System Initiatives:

- **Resident Student Access Initiative:** A system-wide effort to develop a unified approach to resident student recruitment, admissions, and financial aid, with the goal of increasing the percentage of MT high school graduates attending the MUS. Action Steps = 1) College Access Portal, 2) MT Access Scholarship, 3) Tuition Freeze
- **GEAR UP** (Gaining Early Awareness & Readiness for Undergraduate Programs): The purpose of this federal initiative is to increase the number of low-income students who are prepared to enter and succeed in postsecondary education. Montana GEAR UP provides college and career readiness services, such as tutoring, financial aid information, enrollment in rigorous academic courses, comprehensive mentoring, college visits, supplemental curriculum materials, and professional development for school staff. The program serves these students as they progress through middle and high school. In the 2012-13 academic year, *the GEAR UP grant began funding the ACT test for all Montana high school juniors!*

Updated: 6/10/2019

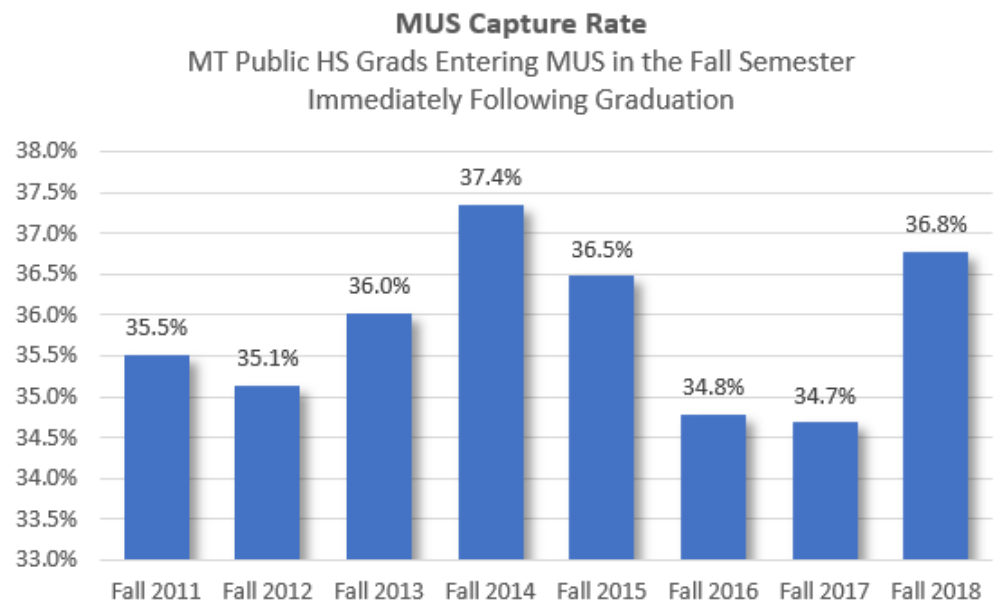
Goal Statement

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

% of Montana high school graduates enrolling in college in the fall semester immediately following graduation (includes grads from both public & private high schools)

College Continuation Rate	2006	2008	2010	2012	2014	2016
# of MT High School Graduates	10,734	10,986	10,521	10,140	9,668	9,648
# of MT Grads Enrolling in College	6,176	6,280	6,371	6,023	5,882	5,392
# of MT Grads Enrolling In-state	4,604	4,838	5,104	4,719	4,621	4,209
# of MT Grads Enrolling Out-of-state	1,572	1,442	1,267	1,304	1,261	1,183
% of MT Grads Enrolling in College	57.5%	57.2%	60.6%	59.4%	60.8%	55.9%
% of MT Grads Enrolling In-state	42.9%	44.0%	48.5%	46.5%	47.8%	43.6%
% of MT Grads Enrolling Out-of-state	14.6%	13.1%	12.0%	12.9%	13.0%	12.3%

In-state Capture Rates

MUS Institutions	33.3%	33.8%	36.7%	36.3%	37.8%	36.0%
Community Colleges	3.8%	4.6%	3.7%	3.3%	3.4%	2.1%
Tribal Colleges	2.6%	2.2%	4.2%	2.5%	1.8%	1.9%
Private Colleges	3.2%	3.4%	4.0%	4.5%	4.7%	3.6%



Retention & Completion

Goal 1:

Access & Affordability

System Initiatives:

MT Project 10

Goal Statement

Rigorously pilot a student success intervention to improve retention and completion among low income students.

Action Steps

- Campus Planning:**
Develop campus plans for implementing supports to accelerate academic progress, remove financial barriers to attendance, and increase students' purpose and belonging.
- Serve Students:** Enroll 300 Pell-eligible students at three MUS campuses in the pilot program in Fall 2020.
- Rigorously Evaluate:** Rigorously track student progress, comparing program students to similar students not selected to participate.

Goal Statement

Prepare students for success in life through quality higher education

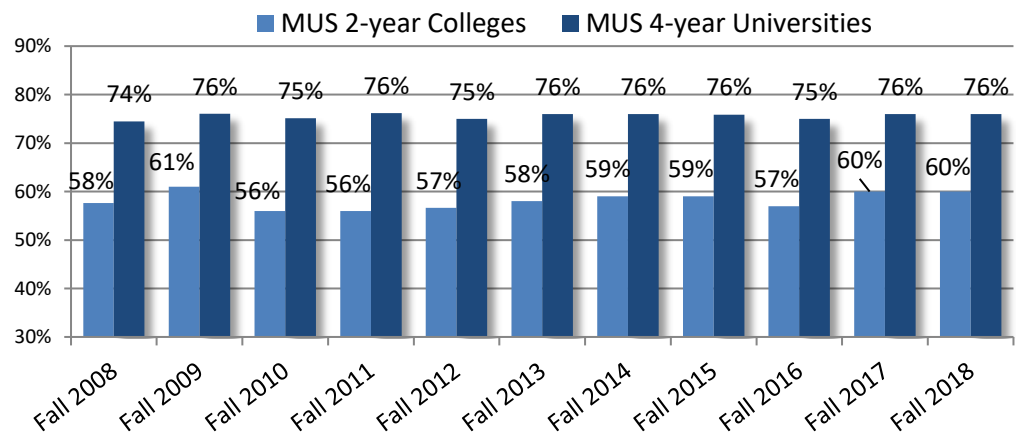
Objective 1.1.2

Increase retention rates within the Montana University System

Metric 1.1.2

MUS Retention Rates

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



Objective 1.1.3

Increase graduation rates within the Montana University System

Metric 1.1.3

Graduation Rates

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

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

Entering Cohort	Entering Cohort #	Graduation Rates (cumulative)					
		3 year	4 year (100%)	5 year	6 year (150%)	7 year	8 year (200%)
Fall 2006	4612	0%	19%	41%	49%	52%	54%
Fall 2007	4600	1%	20%	40%	48%	52%	53%
Fall 2008	4710	1%	19%	40%	48%	52%	53%
Fall 2009	4609	1%	20%	40%	47%	50%	52%
Fall 2010	4933	1%	21%	41%	49%	52%	54%
Fall 2011	4711	1%	23%	44%	51%	53%	
Fall 2012	4498	1%	23%	46%	53%		
Fall 2013	4618	1%	26%	46%			
Fall 2014	4870	1%	28%				
Fall 2015	4736	1%					

Updated: July 2019

Source: Grad Rate Dashboard, OCHE



MUS Strategic Plan

Financial Aid

Goal 1: Access & Affordability

MUS State Funded Need-based Aid Programs, FY19

- MTAP - Montana Tuition Assistance Program, Baker Grants
= \$0
- MHEG - Montana Higher Education Grant
= \$0
- State Work Study
= \$815,781
- State SEOG Match
= \$458,160
- Perkins Match
= \$0
- Governor's Post-secondary Scholarship
= \$279,000
- Total Need-based Aid
= \$1,552,941

MT Access Scholarship

New in FY20, the MUS will embark on a rejuvenated effort to provide state funded need-based aid. The 2019 Legislature appropriated \$1M per year for need-based aid, contingent on MUS campus foundations providing matching dollars.

Updated: July 2019

Goal Statement

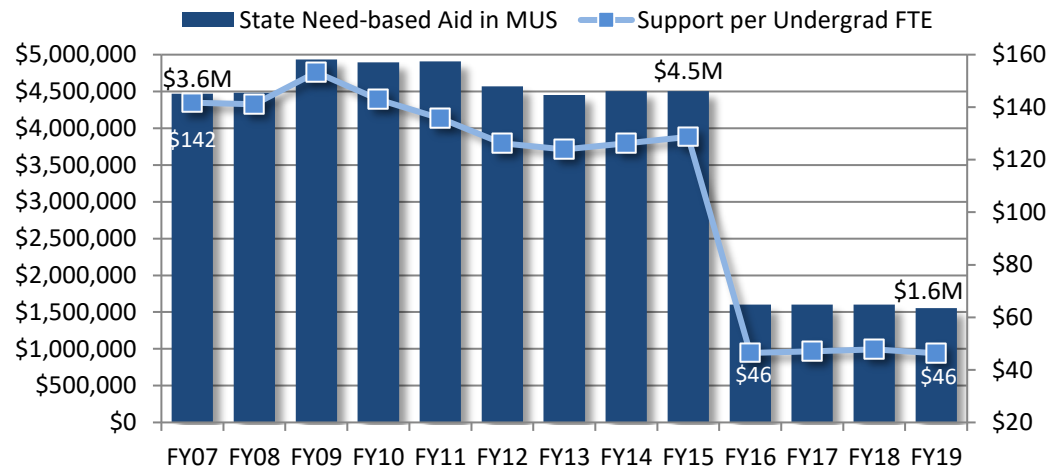
Make higher education more affordable by offering more need-based financial aid and scholarships

Objective 1.2.1

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

Metric 1.2.1

State Funded Need-based Aid & Average Support per Student



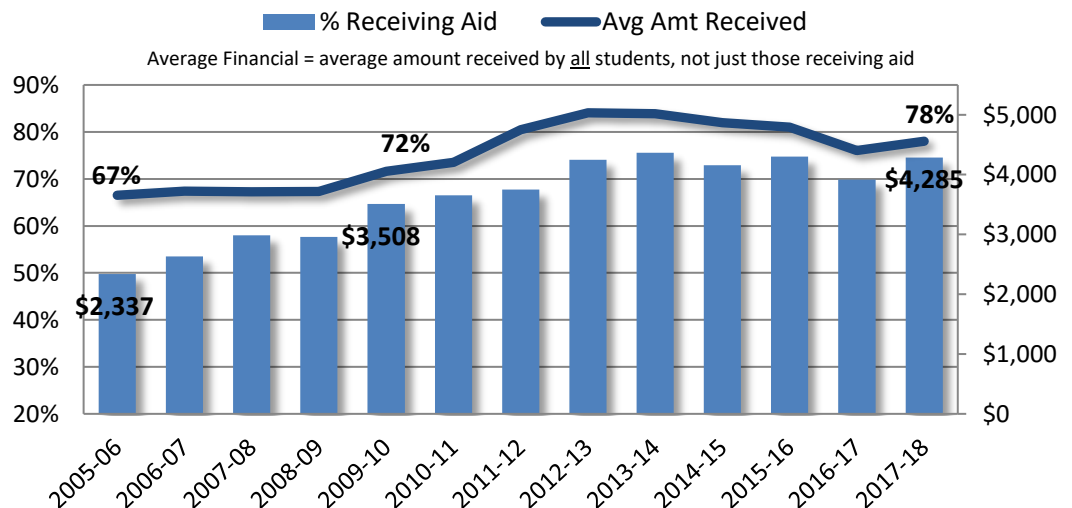
The average amount of state funded need-based aid per student in the nation (\$539 per student) is more than ten times the amount in the MUS. (source: National Assoc. of State Grant and Aid Programs)

Objective 1.2.2

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

MUS Student Financial Aid (all types of aid except loans)

Financial Aid Received by First-time, Full-time Resident Students





MUS Strategic Plan

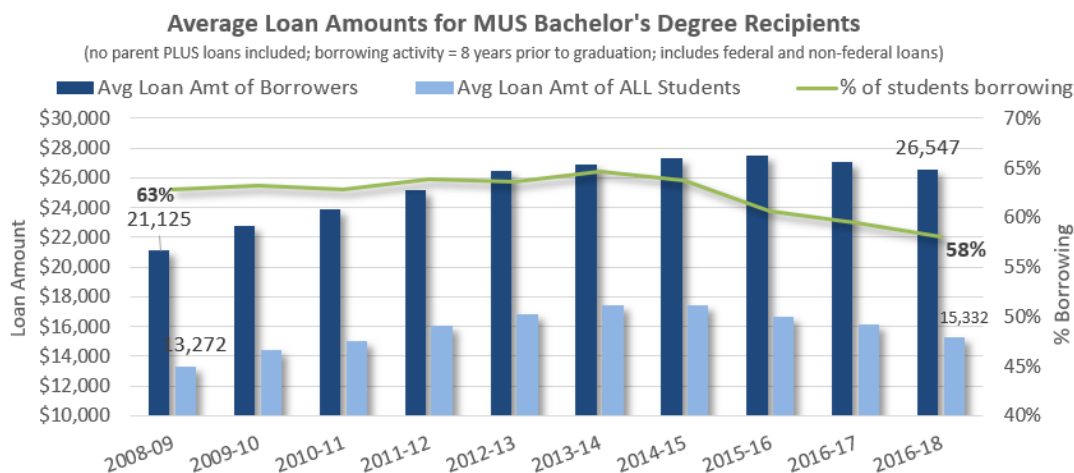
Affordability

Goal Statement

Promote postsecondary education affordability

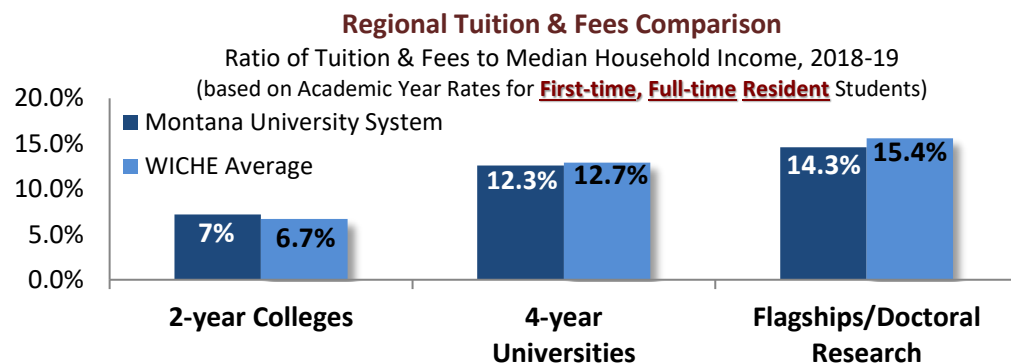
Objective 1.3.1

Decrease average loan amounts and the percentage of students borrowing



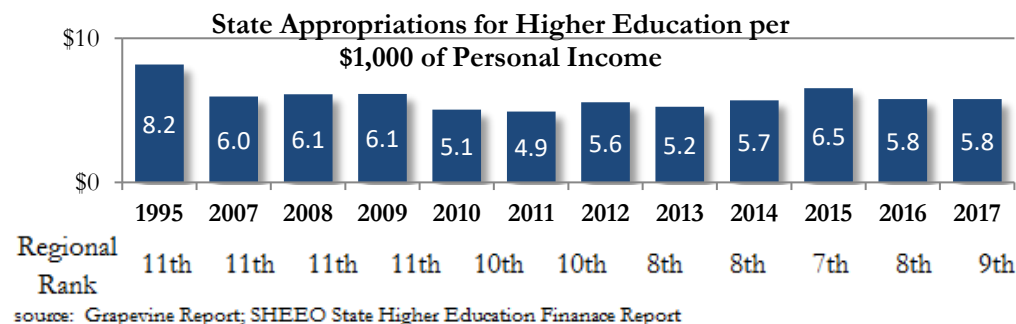
Objective 1.3.2

Decrease tuition as a percentage of median household income



Objective 1.3.3

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



Goal 1: Access & Affordability

System Initiatives:

Tuition Freeze:

- Freeze on tuition for 12 out of 14 years at all two-year colleges (FY08 – FY17, FY20-FY21).
- Regional 4-year campuses (Tech, MSUN, MSUN, and UMW) tuition frozen for 10 out of 14 years since FY08.
- MSU and UM, tuition frozen during 8 of the past 14 years.

Regional Comparison

2018-19: (avg. academic year tuition and fees for full-time students)

MSU/UM = \$7,260
Regional Peers = \$9,310

MSUB, Tech, UMW, MSUN = \$6,253
Regional Peers = \$7,642

MUS 2-yr Colleges = \$3,573
Regional Peers = \$3,889

Financial Literacy:

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



K-20 Collaboration

Goal 1:
Access & Affordability

System Initiatives:

Dual Enrollment

Goal Statement

Increase capacity, awareness, and opportunities for Dual Enrollment in Montana.

Action Steps

- 1) Continue with 12Free program (first 6 credits for free)
- 2) Expand communication of Dual Enrollment opportunities through the new College Access Portal
- 3) Explore ways to centralized dual enrollment registration.

Measure

Target = increase the annual number of dual enrolled students by 10%

Updated: July 2019

Goal Statement

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

Objective 1.4.1

Increase enrollment of at-risk and disadvantaged students

Metric 1.4.1

At-risk & Disadvantaged Student Enrollment in the MUS

% of First-time, Freshmen from Low-income Families/Under-represented Minorities

At-Risk & Disadvantaged Students	Fall 2009	Fall 2010	Fall 2011	Fall 2012	Fall 2013	Fall 2014	Fall 2015	Fall 2016	Fall 2017	Fall 2018
% of Freshmen, Under-represented Minorities	9.2%	9.4%	10.7%	12.5%	12.8%	13.2%	14.1%	15.3%	14.8%	14.9%
% of Freshmen from Low-Income Families*	35.9%	40.5%	41.8%	39.6%	37.4%	34.3%	32.9%	29.0%	30.9%	NA

source: MUS Data Warehouse; *students receiving Pell grants

Objective 1.4.2

Expand outreach to top academic achievers graduating from Montana high schools

MUS Honor Scholarship – BOR Policy 501.1: MUS awards approximately 200 full tuition scholarships to the top MT high school graduates.

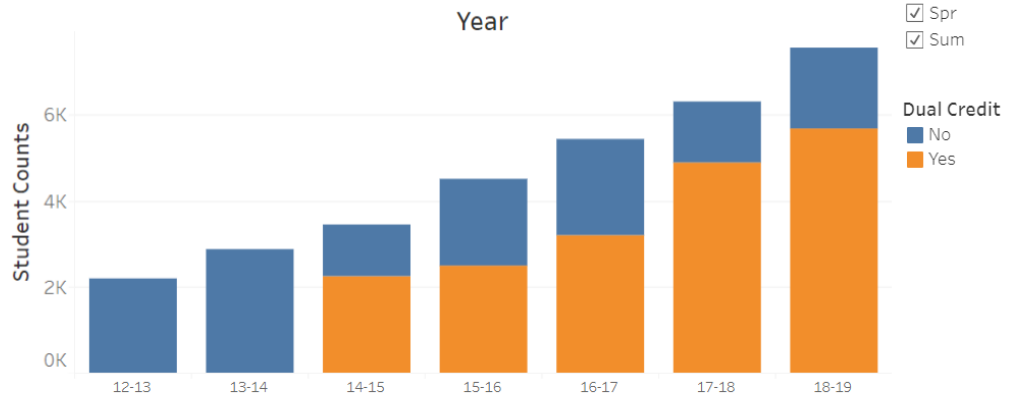
Objective 1.4.3

Increase early access to higher education through dual enrollment

Metric 1.4.3

Dual Enrollment System Totals

Annual number of high school students (age 19 or younger) enrolled in at least one college class; term counts are unduplicated students while year counts are total of all 3 terms



Dual Enrollment Type

	Year						
Dual Credit	12-13	13-14	14-15	15-16	16-17	17-18	18-19
No	2,211	2,872	1,189	2,008	2,247	1,413	1,882
Yes			2,269	2,502	3,198	4,893	5,682
Dual Enrollment Totals	2,211	2,872	3,458	4,510	5,445	6,306	7,564

Source: MUS Dual Enrollment Dashboard

<https://www.mus.edu/data/dashboards/dual-enrollment.asp>



MUS Strategic Plan

Two-Year Education

Goal 1: Access & Affordability

System Initiatives:

2-year Education/CTE

Goal Statement

Expand efforts to communicate and effectively deliver career and technical education (CTE) as an option for students to pursue in the MUS.

Action Steps

(Shared Policy Goal)

- 1) Develop a College and Career Readiness (CCR) Portal that equally promotes CTE and non-CTE opportunities.
- 2) Work with k-12 partners and MUS campuses to more effectively promote CTE opportunities through school counseling and advising strategies.
- 3) Continuously review the effectiveness of existing CTE programs and conduct gap analyses to guide the development of new CTE opportunities that more effectively meet workforce demand.
- 4) Explore avenues for developing a system-level approach for the recruitment of students interested in CTE.

Measure

Target = grow CTE enrollment system-wide by 10%

Goal Statement

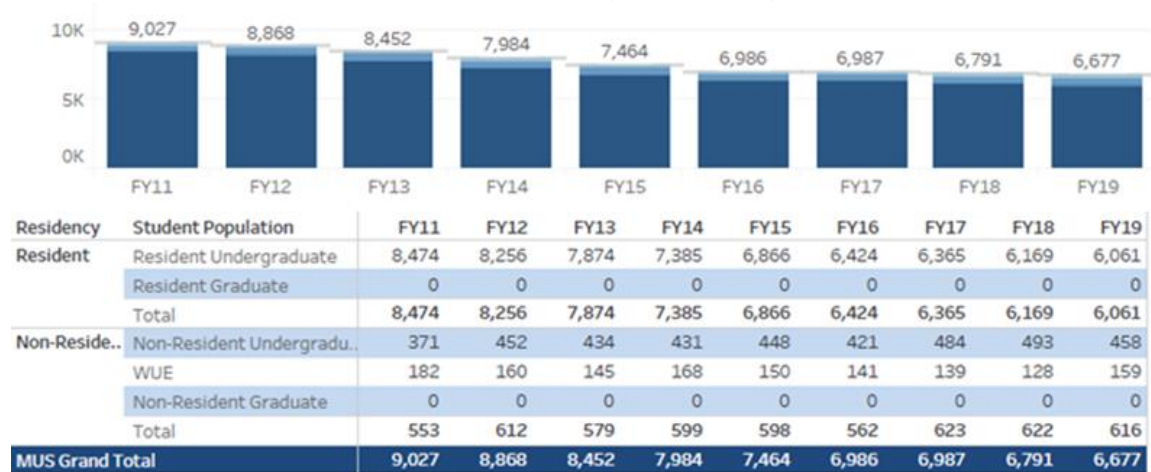
Increase postsecondary enrollment of traditional and non-traditional students through expanded outreach programs, evening/weekend programs, and 2-year programs

Objective 1.5.1

Increase enrollment in two-year programs

Metric 1.5.1

Student FTE at 2-year Campuses
Fiscal Year Enrollment (includes CC's)



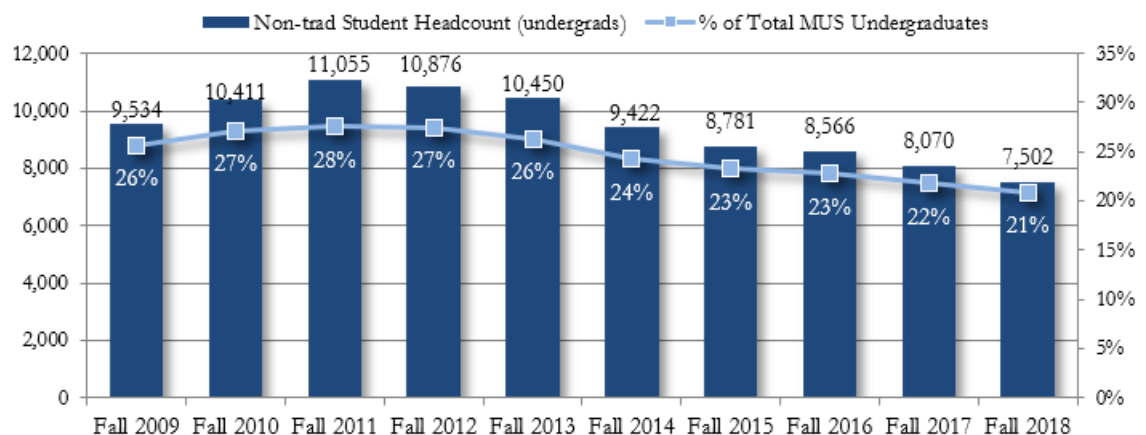
source: FTE Dashboard

Objective 1.5.2

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

Metric 1.5.2

MUS Enrollment of Non-traditional Students (25+ yrs old)





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 100 online degrees and over 700 internet courses.

MUS.edu/online is a central location for students, faculty, and the public to find information on distance education opportunities and topics in the MUS.

Updated: June 2019

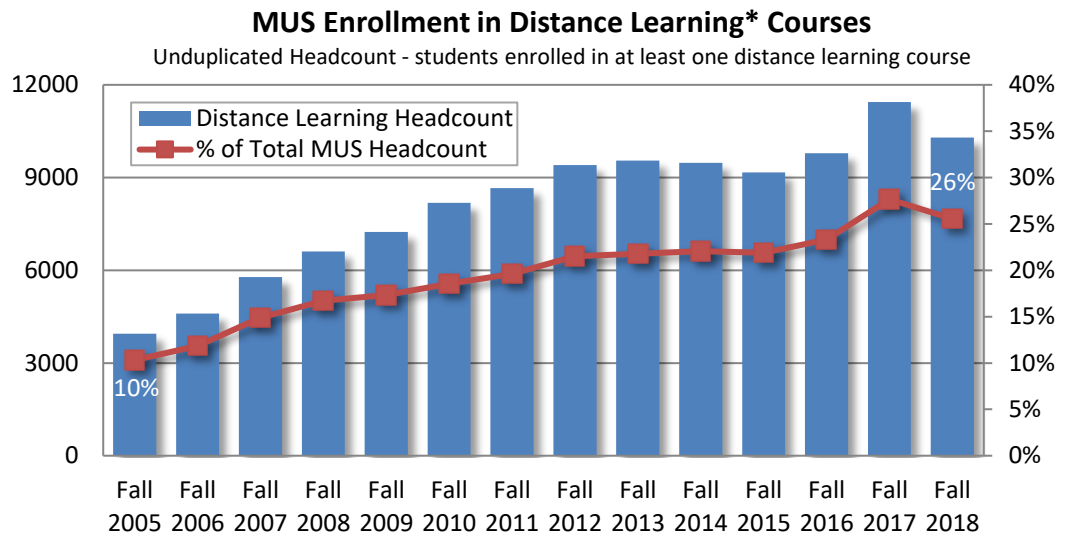
Goal Statement

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



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

*courses where instruction is delivered entirely outside of the traditional classroom setting and there is no "in-person" contact between student and teacher (i.e. on-line and/or video courses)

Objective 1.6.2

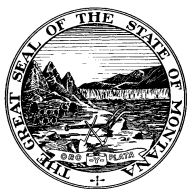
Increase the number of online courses and degrees

Metric 1.6.2

Number of Distance Learning Courses Offered
Fall 2005 - Fall 2015, Unduplicated Number of Courses Offered

MUS Campus	Fall 2006	Fall 2007	Fall 2008	Fall 2009	Fall 2010	Fall 2011	Fall 2012	Fall 2013	Fall 2014	Fall 2015	Fall 2016	Fall 2017	Fall 2018
2-year	143	156	165	177	183	200	220	210	222	212	217	210	212
4-year	254	315	328	359	401	434	495	515	533	536	575	601	591
MUS Total	397	471	493	536	584	634	715	725	755	748	792	811	803
Annual % Chg	16%	19%	5%	9%	9%	9%	13%	1%	4%	-1%	6%	2%	-1%

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



Workforce Development

Goal 2:
Workforce & Economic Development

System Initiatives:

MT STEM Scholarship

The 2019 Legislature revitalized the MT STEM Scholarship by shifting Lottery funding from last dollar to first dollar and extending the number of years that students can receive scholarships from two to four. Award amounts are \$1,000 in the first year, \$1,500 in years two and three, and \$2,000 in year four

CTE/Big Sky Pathways

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.

Updated July 2019

Goal Statement

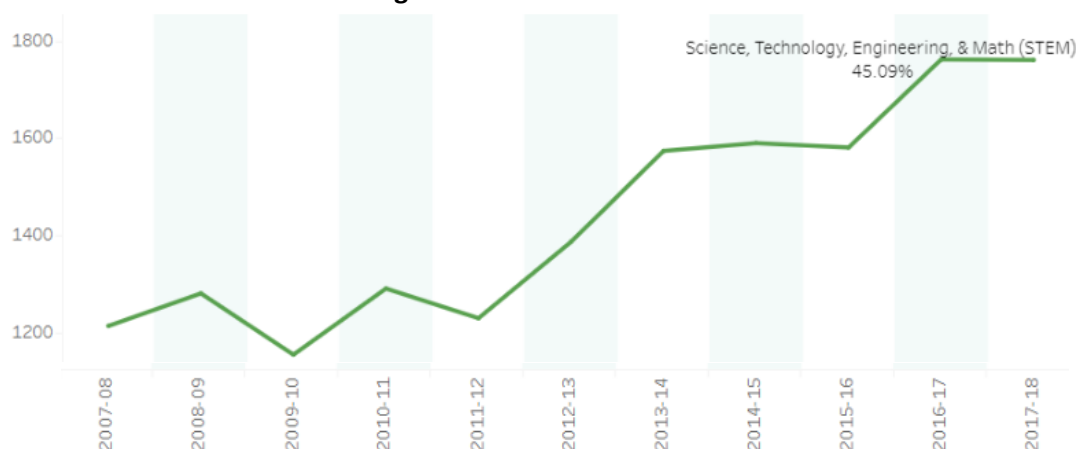
Increase responsiveness to workforce development needs by expanding and developing programs in high demand fields in the state

Objective 2.1.1

Increase degrees and certificates awarded in high-demand occupational fields

Metric 2.1.1

MUS Degrees Awarded in STEM Fields



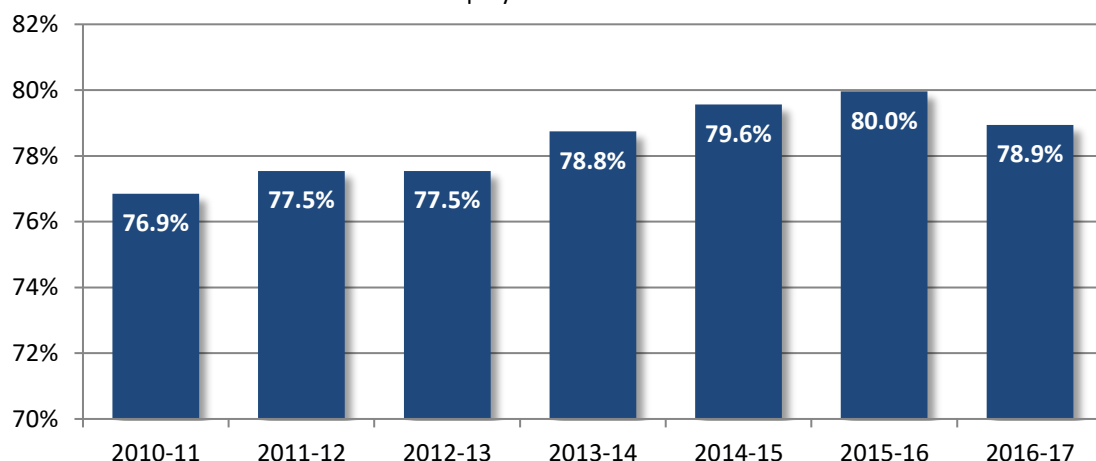
Objective 2.1.2

Increase job placement rates

Metric 2.1.2

Percentage of Resident Graduates Entering Montana's Workforce

Graduates Employed Within One Year of Graduation



source: OCHE/DLI data match; MUS graduates matched to unemployment insurance wage data



Workforce Development

(Continued)

Goal Statement

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

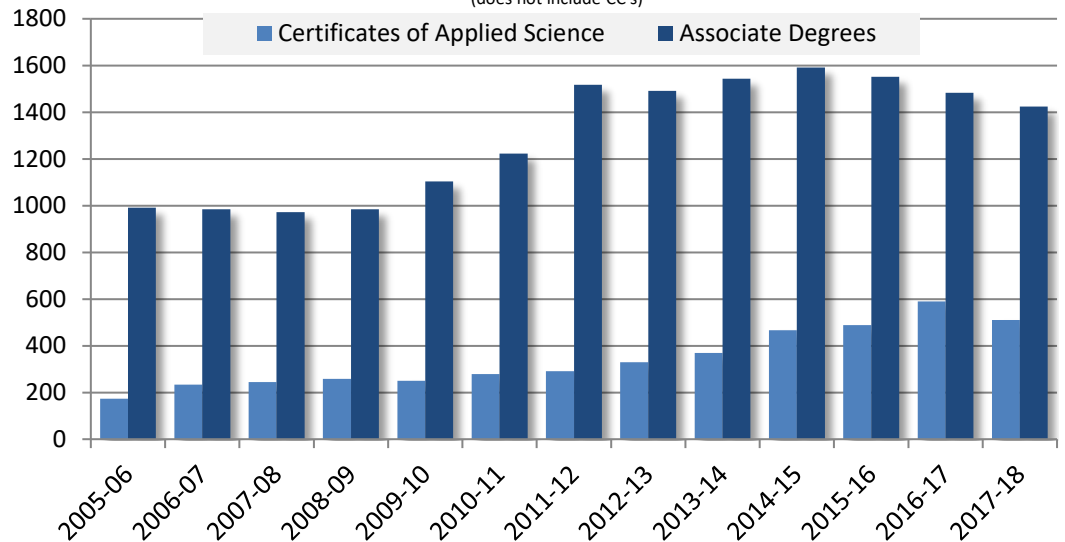
Objective 2.1.3

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

Metric 2.1.3

Degrees & Certificates Awarded by MUS 2-year Colleges

(does not include CC's)



Goal 2:

Workforce & Economic Development

System Initiatives:

MT STEM Scholarship

The 2019 Legislature revitalized the MT STEM Scholarship by shifting Lottery funding from last dollar to first dollar and extending the number of years that students can receive scholarships from two to four. Award amounts are \$1,000 in the first year, \$1,500 in years two and three, and \$2,000 in year four

CTE/Big Sky Pathways

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.

Updated July 2019



Research & Development

Goal 2:

Workforce & Economic Development

System Initiatives:

MUS Research Initiative:

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

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

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

Updated: July 2019

Goal Statement

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

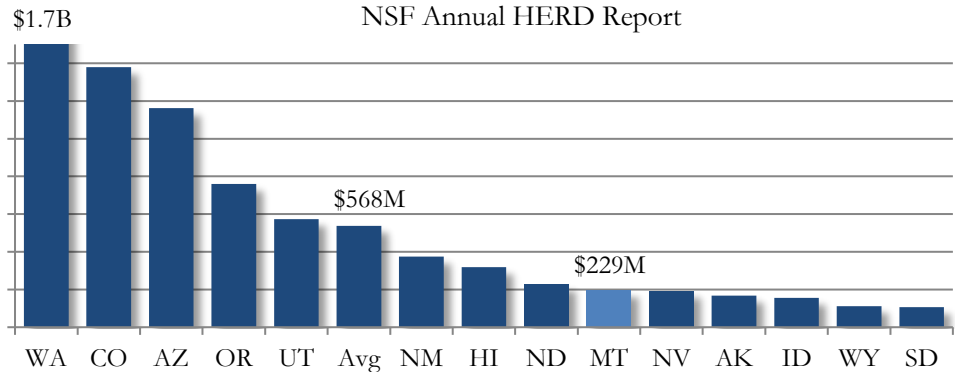
Objective 2.2.1

Increase research & development receipts and expenditures

Metric 2.2.1

Research & Development Expenditures by State, 2017

NSF Annual HERD Report



source: National Science Foundation (NSF)

note: figures may differ slightly from the MUS annual data collection due to reporting criteria

MUS Sponsored Project Expenditures

Campus	FY 2014	FY 2015	FY 2016	FY 2017	FY 2018
MSU Bozeman	\$109,612,283	\$106,878,735	\$118,388,115	\$130,788,759	\$126,796,737
MSU Billings	\$2,815,426	\$3,345,519	\$3,291,941	\$3,299,073	\$3,265,749
MSU Northern	\$1,710,788	\$2,696,257	\$2,712,962	\$2,127,012	\$1,479,406
UM Missoula	\$58,272,583	\$64,572,795	\$78,536,903	\$88,152,772	\$86,456,120
MT Tech	\$6,926,744	\$7,569,062	\$7,727,561	\$8,643,766	\$8,250,179
UM Western	\$679,964	\$694,977	\$653,516	\$934,471	\$786,239
MUS Total	\$180,017,788	\$185,757,345	\$211,310,998	\$233,945,853	\$227,034,430

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

Objective 2.2.1

Increase technology licenses with Montana businesses

Metric 2.2.1

MUS Technology Transfer Activity

MUS Tech Transfer Stats	FY 2013	FY 2014	FY 2015	FY 2016	FY 2017	FY 2018
Patents Issued	9	8	7	8	9	11
Active Licenses (Total)	238	287	302	281	316	314
Active Licenses (in MT)	82	87	89	83	94	96
% Licenses w/ MT Companies	34%	30%	29%	30%	30%	31%
License/Patent Revenues	\$454,479	\$315,560	\$437,782	\$568,324	\$401,140	\$393,037
Reimbursed Patent Costs	\$131,007	\$250,155	\$151,260	\$599,996	\$394,622	\$287,468

source: MUS Annual Research Report



Graduate Education

Goal 2: Workforce & Economic Development

System Initiatives:

Faculty, staff, and students in the Montana University System (MUS) are engaged in science and technology research and graduate education that help build Montana's economic future. The MUS research enterprise also builds partnerships with communities, businesses, and other educational entities to help align science education and research with pressing social and economic challenges.

Expanding graduate education capacity and opportunities will help grow the MUS research enterprise. The following initiatives are key to this effort:

- Improved stipends and resident tuition status to attract competitive graduate students;
- Sufficient start-up funding packages and salaries to retain and recruit competitive faculty;
- Strategic addition of graduate programs to meet workforce needs and research opportunities ; and
- Innovative partnerships and financing to build modern facilities and a competitive research infrastructure.

Goal Statement

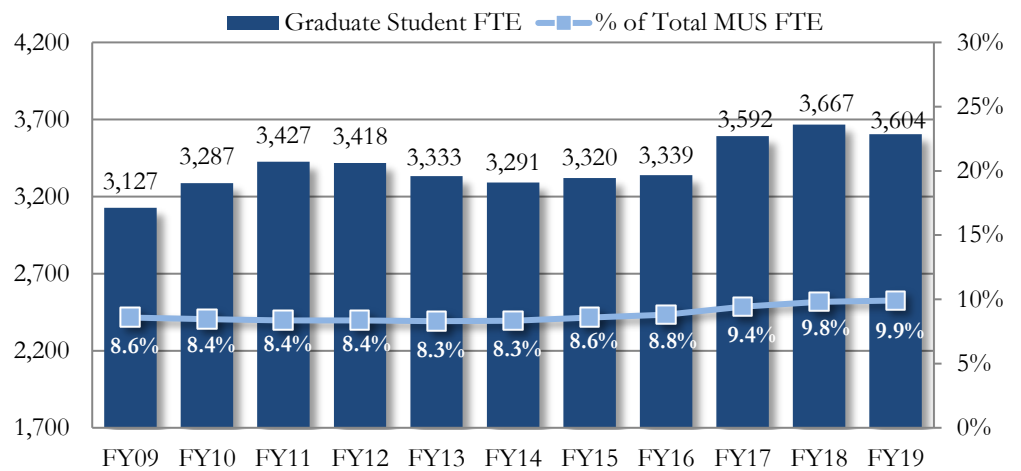
Expand graduate education capacity and opportunities in order to increase educational attainment of Montanans, fuel economic development, grow the research and development enterprise, and contribute to the cultural and social fabric of Montana and the region.

Objective 2.3.1

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

Metric 2.3.1

Graduate Student Enrollment - Student FTE



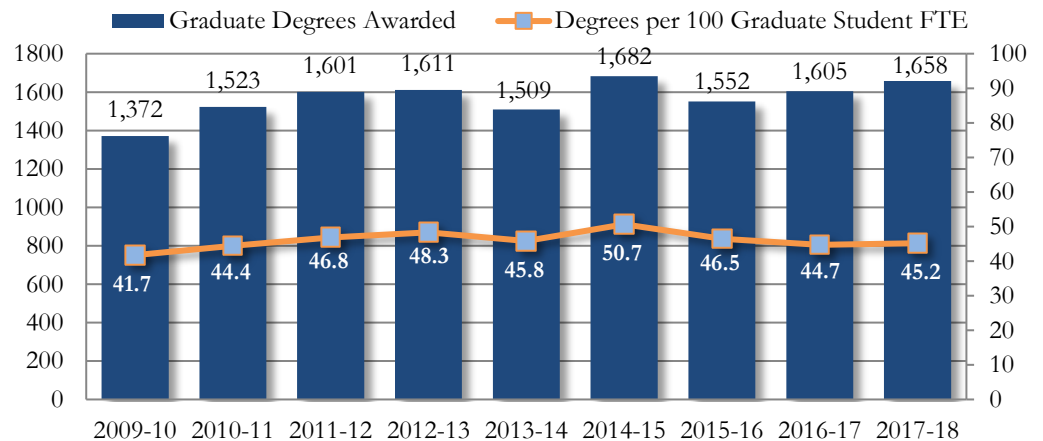
Source: MUS Data Warehouse; note: graduate FTE includes students enrolled in master's, doctorate and professional programs

Objective 2.3.2

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

Metric 2.3.2

MUS Graduate Degrees Awarded





Information Technology

Goal 3: Efficiency & Effectiveness

MUS Shared Services related to Information Technology

1. Banner Finance & HR (UM & MSU sides)
2. Benefits Enrollment & Administration
3. Common Course Numbering Admin.
4. MUS Data Warehouse (Student, HR, & Finance)
5. Student Conduct Software (Maxient)

Potential Shared Services

1. Reporting & Analysis Software
2. Central Admissions Application Process
3. File Sharing Services
4. Electronic Document Services
5. Audit/risk assessment software
6. Research/Academic Analytics Software

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.



MUS Strategic Plan

Efficiency

Goal 3: Efficiency & Effectiveness

System Initiatives:

Shared Services

Goal Statement

Increase the number of services either facilitated, coordinated, or directed in a system-wide fashion that will increase efficiencies, effectiveness and cost savings at individual campuses and system-wide.

Action Steps

- 1) **Inventory:** update an inventory of system-wide shared services
- 2) **Taskforce:** convene a taskforce to help identify potential services to share and sets goals
- 3) **Focus Areas:** identify and prioritize “areas of focus” to target for shared services implementation

Updated: July 2019

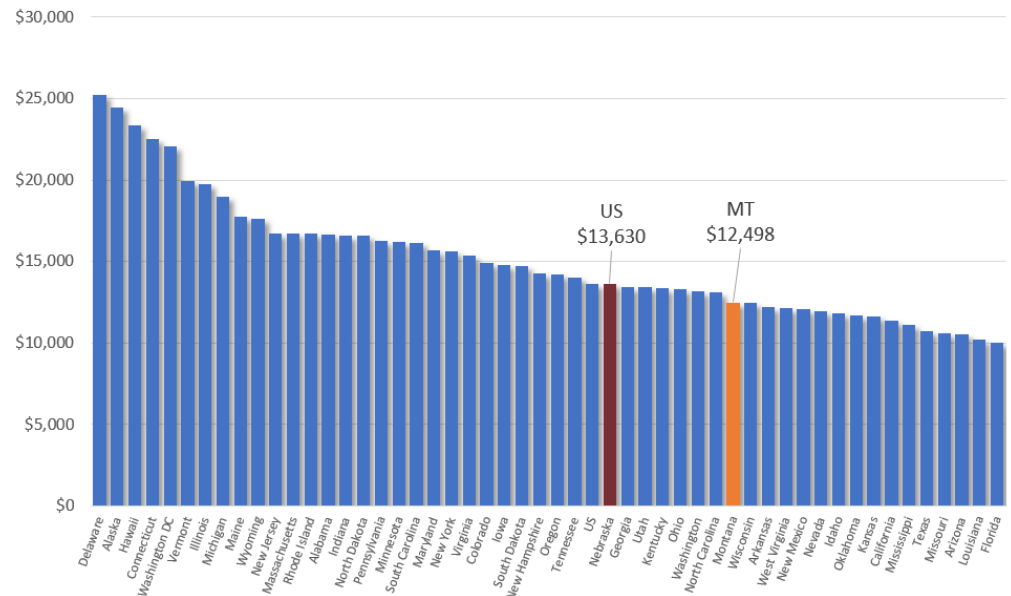
Goal Statement

Deliver efficient and coordinated services

Metric 3.2.1

Educational Revenue per Student FTE, FY18

Educational revenue is the sum of public higher education state appropriations and public in-state and out-of-state net tuition. (unadjusted for cost of living and enrollment mix; includes CC's)



source: SHEEO, State Higher Education Finance Report <http://www.sheeo.org>

Metric 3.2.2

MUS Expenditures by Program Area

Current Unrestricted Expenditures, source: BUD 220

Expenditure Categories	Budgeted						
	1985	1995	2005	2010	2015	2018	2019
Instruction	54%	56%	55%	53%	54%	54%	54%
Research	1%	1%	1%	1%	1%	1%	1%
Public Service	0%	1%	1%	1%	1%	1%	1%
Academic Support	12%	12%	13%	13%	13%	12%	12%
Student Services	9%	9%	8%	9%	10%	10%	10%
Institutional Support	10%	9%	10%	10%	10%	10%	10%
O & M	13%	13%	13%	13%	12%	12%	13%

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



MUS Strategic Plan

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 June 2019, more than 10,000 courses in over 60 disciplines have gone through the Common Course Numbering process and developed program outcomes. This represents 100% of the undergraduate courses in the MUS.

Updated: June 2019

Goal Statement

Deliver efficient and coordinated services.

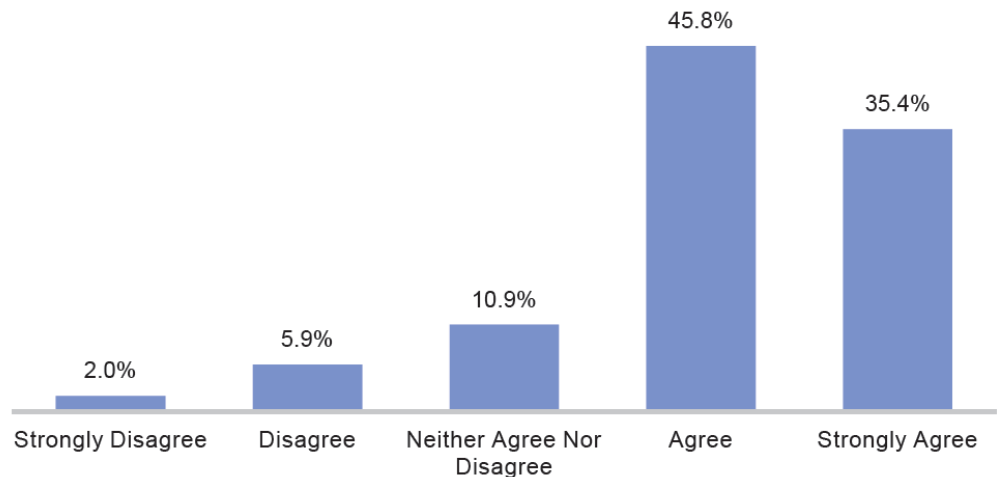
Objective 3.3.1

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

Metric 3.3.1

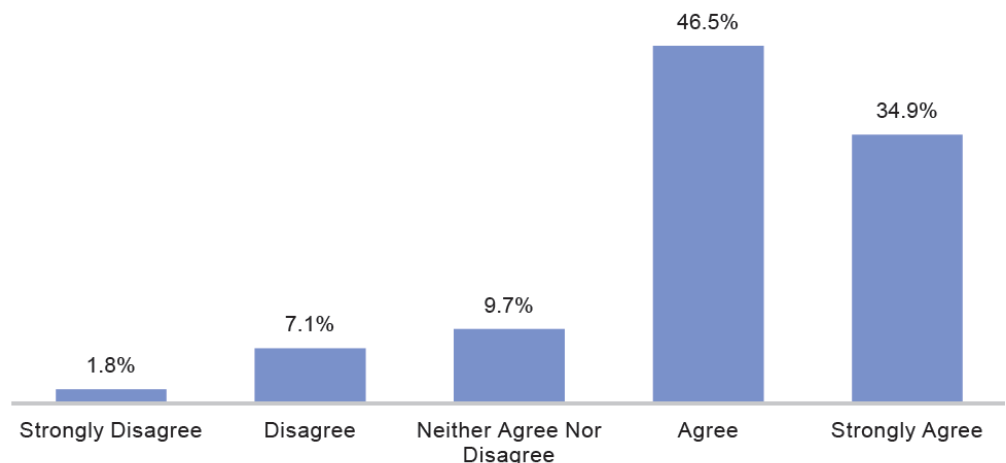
In 2019, the Legislative Audit Division conducted a survey of over 12,000 recent transfer students (response rate = 10.6%).

Transfer Survey Student Response to: “Overall, I am satisfied with my experience transferring between campuses in the Montana University System.”



Source: Compiled by the Legislative Audit Division from student transfer survey data.

Transfer Survey Student Response to: “The transfer process from one Montana campus to another was simple.”



Source: Compiled by the Legislative Audit Division from student transfer survey data.



MUS Strategic Plan

Budget Allocation

Goal 3: Efficiency & Effectiveness

Performance Funding History:

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

Following the approval of the initial performance funding model, a Performance Funding Taskforce comprised of MUS administrators and faculty leaders, designed a more detailed model. The Montana Board of Regents approved the model in May 2014 for allocation of funds in fiscal years 2016, 2017 and beyond.

This current version of the performance funding model was used to allocate \$15 million of state appropriations for FY20, approximately 8% of the total state appropriation to the MUS educational units.

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.

Performance Funding

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