Board of Regents’

MUS Strategic Plan 2016

Approved: July 2006
Updated: June 2016

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

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

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

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

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

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

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

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

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

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

Maintaining the high quality of our institutions and the education provided to our students is not listed as an explicit goal. This is because it is THE MOST IMPORTANT consideration for every goal and initiative of the Montana University System and is considered to be an integral part of every component of this strategic plan.
In order to provide a dynamic and effective strategic plan, the Board of Regents subscribes to the following Guiding Principles for the on-going development and review of the MUS Strategic Plan.

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

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

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

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

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

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

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

System Initiatives:

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

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

Updated: 12/30/2015
Goal 1: Access & Affordability

**System Initiatives:**

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

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

Updated: Dec. 2015

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**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

- **2-year Colleges**
  - Fall 2005: 54.6%
  - Fall 2006: 74.6%
  - Fall 2007: 75.9%
  - Fall 2008: 74.6%
  - Fall 2009: 75.9%
  - Fall 2010: 74.6%
  - Fall 2011: 75.9%
  - Fall 2012: 74.6%
  - Fall 2013: 75.9%
  - Fall 2014: 74.6%

- **4-year Universities**
  - Fall 2005: 60.0%
  - Fall 2006: 54.6%
  - Fall 2007: 60.0%
  - Fall 2008: 74.6%
  - Fall 2009: 75.9%
  - Fall 2010: 74.6%
  - Fall 2011: 75.9%
  - Fall 2012: 74.6%
  - Fall 2013: 75.9%
  - Fall 2014: 74.6%

**Objective 1.1.3**

Increase graduation rates within the Montana University System

**Metric 1.1.3**

**Graduation Rates**

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

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

<table>
<thead>
<tr>
<th>Entering Cohort</th>
<th>Entering Cohort #</th>
<th>Graduation Rates (cumulative)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>3 year</td>
</tr>
<tr>
<td>Fall 2006</td>
<td>4612</td>
<td>0%</td>
</tr>
<tr>
<td>Fall 2007</td>
<td>4600</td>
<td>1%</td>
</tr>
<tr>
<td>Fall 2008</td>
<td>4710</td>
<td>1%</td>
</tr>
<tr>
<td>Fall 2009</td>
<td>4609</td>
<td>1%</td>
</tr>
<tr>
<td>Fall 2010</td>
<td>4933</td>
<td>1%</td>
</tr>
<tr>
<td>Fall 2011</td>
<td>4711</td>
<td>1%</td>
</tr>
<tr>
<td>Fall 2012</td>
<td>4498</td>
<td>1%</td>
</tr>
</tbody>
</table>
Goal 1: Access & Affordability
MUS State Funded Need-based Aid Programs, FY15

- MTAP - Montana Tuition Assistance Program, Baker Grants
  = $1,862,294
- MHEG - Montana Higher Education Grant
  = $576,436
- State Work Study
  = $863,001
- State SEOG Match
  = $389,880
- Perkins Match
  = $68,280
- Governor’s Post-secondary Scholarship
  = $2,182,500 total
  = $742,876 need
- Total Need-based Aid
  = $4,502,767

Loan Information
In 2013-14, 55% of 1st-time, full-time Montana residents attending a campus in the MUS took out student loans for an average amount of $5,446; in 2002-03, 58% took out loans at an average of $3,290 per student (does not include parent PLUS loans).

From the graduating class of 2014-15, the average loan debt for all 4-year degree recipients was $17,424; 64% took out loans for an average of $27,326, of those who borrowed.

Updated: Jan. 2016

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 need-based aid per student in the WICHE region ($264 per student) is more than double the amount in the MUS. (source: National Ass. 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

Average Financial = average amount received by all students, not just those receiving aid

Updated: Jan. 2016
Goal 1: Access & Affordability

System Initiatives:

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

Regional Comparison 2015-16: (avg. academic year tuition and fees for full-time students)

<table>
<thead>
<tr>
<th>Institutional Type</th>
<th>2015-16</th>
<th>2014-15</th>
<th>2010-11</th>
<th>2005-06</th>
</tr>
</thead>
<tbody>
<tr>
<td>2-year Institutions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Montana</td>
<td>6.8%</td>
<td>6.7%</td>
<td>8.1%</td>
<td>6.9%</td>
</tr>
<tr>
<td>Regional Avg.</td>
<td>6.2%</td>
<td>6.0%</td>
<td>5.5%</td>
<td>4.3%</td>
</tr>
<tr>
<td>4-year Institutions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Montana</td>
<td>10.5%</td>
<td>10.4%</td>
<td>12.0%</td>
<td>10.6%</td>
</tr>
<tr>
<td>Regional Avg.</td>
<td>11.6%</td>
<td>11.2%</td>
<td>10.1%</td>
<td>7.8%</td>
</tr>
<tr>
<td>Doctoral Institutions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Montana</td>
<td>12.7%</td>
<td>12.6%</td>
<td>14.5%</td>
<td>12.1%</td>
</tr>
<tr>
<td>Regional Avg.</td>
<td>14.5%</td>
<td>14.0%</td>
<td>13.0%</td>
<td>9.5%</td>
</tr>
</tbody>
</table>

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.

Goal Statement
Promote postsecondary education affordability

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

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Avg Loan Debt</th>
<th>% Borrowing</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004-05</td>
<td>3455</td>
<td>57%</td>
</tr>
<tr>
<td>2005-06</td>
<td>4436</td>
<td>60%</td>
</tr>
<tr>
<td>2006-07</td>
<td>4315</td>
<td>52%</td>
</tr>
<tr>
<td>2007-08</td>
<td>3711</td>
<td>55%</td>
</tr>
<tr>
<td>2008-09</td>
<td>3511</td>
<td>57%</td>
</tr>
<tr>
<td>2009-10</td>
<td>3436</td>
<td>54%</td>
</tr>
<tr>
<td>2010-11</td>
<td>4436</td>
<td>60%</td>
</tr>
<tr>
<td>2011-12</td>
<td>5511</td>
<td>52%</td>
</tr>
<tr>
<td>2012-13</td>
<td>5579</td>
<td>55%</td>
</tr>
<tr>
<td>2013-14</td>
<td>4436</td>
<td>60%</td>
</tr>
<tr>
<td>2014-15</td>
<td>3455</td>
<td>57%</td>
</tr>
</tbody>
</table>

Objective 1.3.2
Decrease tuition as a percentage of median household income

Ratio of Tuition and Fees to Median Household Income

<table>
<thead>
<tr>
<th>Year</th>
<th>2015-16</th>
<th>2014-15</th>
<th>2010-11</th>
<th>2005-06</th>
</tr>
</thead>
<tbody>
<tr>
<td>2-year Institutions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Montana</td>
<td>6.8%</td>
<td>6.7%</td>
<td>8.1%</td>
<td>6.9%</td>
</tr>
<tr>
<td>Regional Avg.</td>
<td>6.2%</td>
<td>6.0%</td>
<td>5.5%</td>
<td>4.3%</td>
</tr>
<tr>
<td>4-year Institutions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Montana</td>
<td>10.5%</td>
<td>10.4%</td>
<td>12.0%</td>
<td>10.6%</td>
</tr>
<tr>
<td>Regional Avg.</td>
<td>11.6%</td>
<td>11.2%</td>
<td>10.1%</td>
<td>7.8%</td>
</tr>
<tr>
<td>Doctoral Institutions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Montana</td>
<td>12.7%</td>
<td>12.6%</td>
<td>14.5%</td>
<td>12.1%</td>
</tr>
<tr>
<td>Regional Avg.</td>
<td>14.5%</td>
<td>14.0%</td>
<td>13.0%</td>
<td>9.5%</td>
</tr>
</tbody>
</table>

Note: Tuition and fees used in the calculation are the average resident tuition and fees for full-time undergraduates

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

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

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>8.18</td>
<td>5.96</td>
<td>6.12</td>
<td>6.14</td>
<td>5.06</td>
<td>4.91</td>
<td>5.56</td>
<td>5.25</td>
<td>5.70</td>
<td>6.53</td>
</tr>
</tbody>
</table>

Regional Rank* 11th 11th 11th 11th 10th 10th 8th 8th 7th


Updated: Jan. 2016
Goal Statement

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

Objective 1.4.1
Expand outreach to at-risk and disadvantaged students as to the importance and accessibility of postsecondary education and the quality of the MUS

Metric 1.4.1
At-risk & Disadvantaged Student Enrollment in the MUS
% of First-time, Freshmen from Low-income Families/Under-represented Minorities

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

source: MUS Data Warehouse; *students receiving Pell grants

Objective 1.4.2
Expand outreach to top academic achievers graduating from Montana high schools

Metric 1.4.2
Top Performing Students in the MUS
% of MT High School Graduates Entering the MUS with ACT/SAT Scores in the Top Quartile*

<table>
<thead>
<tr>
<th>ACT/SAT Test Takers</th>
<th>Fall 2006</th>
<th>Fall 2007</th>
<th>Fall 2008</th>
<th>Fall 2009</th>
<th>Fall 2010</th>
<th>Fall 2011</th>
<th>Fall 2012</th>
<th>Fall 2013</th>
<th>Fall 2014</th>
<th>Fall 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of Freshmen scoring in top quartile*</td>
<td>31%</td>
<td>31%</td>
<td>31%</td>
<td>31%</td>
<td>32%</td>
<td>32%</td>
<td>32%</td>
<td>31%</td>
<td>30%</td>
<td>29%</td>
</tr>
</tbody>
</table>

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

source: MUS High School Follow-up Report

Objective 1.4.3
Increase dual enrollment and advanced placement

Metric 1.4.3
Advance Placement and Dual Enrollment
# of MT High School Students Taking AP Exams and Early Colleges Courses

<table>
<thead>
<tr>
<th>MT High School Students</th>
<th>2009-10 (Fall 09)</th>
<th>2010-11 (Fall 10)</th>
<th>2011-12 (Fall 11)</th>
<th>2012-13 (Fall 12)</th>
<th>2013-14 (Fall 13)</th>
<th>2013-14 (Fall 14)</th>
<th>2014-15 (Fall 15)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced Placement: # of AP exams administered (exam volume)</td>
<td>4,084</td>
<td>4,607</td>
<td>4,683</td>
<td>4,844</td>
<td>4,868</td>
<td>5,309</td>
<td>5,090</td>
</tr>
<tr>
<td>Dual Enrollment: # enrolled in at least one college course in MUS*</td>
<td>879</td>
<td>720</td>
<td>1,137</td>
<td>1,180</td>
<td>1,600</td>
<td>2,070</td>
<td>2,111</td>
</tr>
</tbody>
</table>

source: College Board, AP Report; MUS Data Warehouse
Goal 1: Access & Affordability

System Initiatives:

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

In Fall 2015, 27% of undergraduate students in the MUS enrolled at a 2-year college.
(source: MUS Data Warehouse)

Nationally, 49% of all undergraduates attending public higher education institutions enrolled at 2-year colleges (MT ranks 42nd in the nation).
(source: IPEDS, Fall 2013)

Updated: Feb. 2016

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, Fiscal Year Enrollment

<table>
<thead>
<tr>
<th></th>
<th>FY05</th>
<th>FY14</th>
<th>FY15</th>
<th>% CHG 14 to 15</th>
<th>% CHG 05 to 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>MUS 2-year Colleges</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City College at MSU Billings</td>
<td>667</td>
<td>887</td>
<td>804</td>
<td>-9.4%</td>
<td>20.5%</td>
</tr>
<tr>
<td>Great Falls College MSU</td>
<td>1,080</td>
<td>1,379</td>
<td>1,282</td>
<td>-7.0%</td>
<td>18.7%</td>
</tr>
<tr>
<td>Gallatin College MSU</td>
<td>13</td>
<td>403</td>
<td>442</td>
<td>9.6%</td>
<td>3238.5%</td>
</tr>
<tr>
<td>Helena College UM</td>
<td>684</td>
<td>970</td>
<td>940</td>
<td>-3.1%</td>
<td>37.5%</td>
</tr>
<tr>
<td>Missoula College UM</td>
<td>917</td>
<td>1,668</td>
<td>1,481</td>
<td>-11.2%</td>
<td>61.6%</td>
</tr>
<tr>
<td>Highlands College of MT Tech</td>
<td>280</td>
<td>386</td>
<td>361</td>
<td>-6.4%</td>
<td>28.8%</td>
</tr>
<tr>
<td>MUS 2-year Total</td>
<td>3,641</td>
<td>5,693</td>
<td>5,310</td>
<td>-6.7%</td>
<td>45.8%</td>
</tr>
</tbody>
</table>

Community Colleges

<table>
<thead>
<tr>
<th></th>
<th>FY05</th>
<th>FY14</th>
<th>FY15</th>
<th>% CHG 14 to 15</th>
<th>% CHG 05 to 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dawson Community College</td>
<td>497</td>
<td>309</td>
<td>269</td>
<td>-13.0%</td>
<td>-46.0%</td>
</tr>
<tr>
<td>Flathead Valley Community College</td>
<td>1,457</td>
<td>1,626</td>
<td>1,526</td>
<td>-8.7%</td>
<td>-1.0%</td>
</tr>
<tr>
<td>Miles Community College</td>
<td>542</td>
<td>357</td>
<td>360</td>
<td>-8.5%</td>
<td>-29.8%</td>
</tr>
<tr>
<td>Community College Total</td>
<td>2,496</td>
<td>2,291</td>
<td>2,154</td>
<td>-6.0%</td>
<td>-13.7%</td>
</tr>
<tr>
<td>Two-year Education Total</td>
<td>6,136</td>
<td>7,984</td>
<td>7,464</td>
<td>-6.5%</td>
<td>21.6%</td>
</tr>
</tbody>
</table>

(source: MUS Enrollment Reports http://www.mus.edu/data/enrollment/enrollment.asp)

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)

<table>
<thead>
<tr>
<th>Campus Type</th>
<th>Fall 2009</th>
<th>Fall 2010</th>
<th>Fall 2011</th>
<th>Fall 2012</th>
<th>Fall 2013</th>
<th>Fall 2014</th>
<th>Fall 2015</th>
<th>% Chg 09 to 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>2-year</td>
<td>3,074</td>
<td>3,447</td>
<td>3,645</td>
<td>3,633</td>
<td>3,473</td>
<td>3,079</td>
<td>2,941</td>
<td>-4.3%</td>
</tr>
<tr>
<td>4-year</td>
<td>5,371</td>
<td>5,785</td>
<td>5,905</td>
<td>6,019</td>
<td>5,806</td>
<td>5,272</td>
<td>4,844</td>
<td>-9.8%</td>
</tr>
</tbody>
</table>
Goal Statement
Improve distance and on-line learning by coordinating online delivery of education across the entire Montana University System

Objective 1.6.1
Increase student enrollment in online courses

Metric 1.6.1

MUS Enrollment in Distance Learning* Courses
Unduplicated Headcount - students enrolled in at least one distance learning course

<table>
<thead>
<tr>
<th>Year</th>
<th>Distance Learning Headcount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2005</td>
<td>3,947</td>
</tr>
<tr>
<td>Fall 2006</td>
<td>4,602</td>
</tr>
<tr>
<td>Fall 2007</td>
<td>5,778</td>
</tr>
<tr>
<td>Fall 2008</td>
<td>6,609</td>
</tr>
<tr>
<td>Fall 2009</td>
<td>7,242</td>
</tr>
<tr>
<td>Fall 2010</td>
<td>8,185</td>
</tr>
<tr>
<td>Fall 2011</td>
<td>8,656</td>
</tr>
<tr>
<td>Fall 2012</td>
<td>9,399</td>
</tr>
<tr>
<td>Fall 2013</td>
<td>9,549</td>
</tr>
<tr>
<td>Fall 2014</td>
<td>9,481</td>
</tr>
<tr>
<td>Fall 2015</td>
<td>9,169</td>
</tr>
</tbody>
</table>

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

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

Objective 1.6.2
Increase the number of online courses and degrees

Metric 1.6.2

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

<table>
<thead>
<tr>
<th>MUS Campus</th>
<th>Fall 2005</th>
<th>Fall 2006</th>
<th>Fall 2007</th>
<th>Fall 2008</th>
<th>Fall 2009</th>
<th>Fall 2010</th>
<th>Fall 2011</th>
<th>Fall 2012</th>
<th>Fall 2013</th>
<th>Fall 2014</th>
<th>Fall 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>2-year</td>
<td>103</td>
<td>143</td>
<td>156</td>
<td>165</td>
<td>177</td>
<td>183</td>
<td>200</td>
<td>220</td>
<td>210</td>
<td>222</td>
<td>212</td>
</tr>
<tr>
<td>4-year</td>
<td>239</td>
<td>254</td>
<td>315</td>
<td>328</td>
<td>359</td>
<td>401</td>
<td>434</td>
<td>495</td>
<td>515</td>
<td>533</td>
<td>536</td>
</tr>
<tr>
<td>MUS Total</td>
<td>342</td>
<td>397</td>
<td>471</td>
<td>493</td>
<td>536</td>
<td>584</td>
<td>634</td>
<td>715</td>
<td>725</td>
<td>755</td>
<td>748</td>
</tr>
<tr>
<td>Annual % Chg</td>
<td>1%</td>
<td>16%</td>
<td>19%</td>
<td>5%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>13%</td>
<td>1%</td>
<td>4%</td>
<td>-1%</td>
</tr>
</tbody>
</table>

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

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.


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

Updated: Apr. 2016
Goal 2: Workforce & Economic Development

System Initiatives:

- **SWAMMEI Grant**: $25 million grant to boost job training programs at the 13 two-year colleges across Montana. The goal is to train more than 9,000 Montanans to fill good-paying jobs in the rapidly growing advanced manufacturing and energy industries.

- **HealthCARE Montana**: A $15 million grant supporting a partnership between the Montana Department of Labor and Industry and 15 of Montana’s two-year colleges. The partnership builds a pathway to training programs that will meet the current and future needs of organizations in healthcare. Montana is projected to have massive workforce shortages in health fields and this project will help address the projected gap in occupations such as nursing, dental assistant, EMT, health information technology, and medical transcription by aligning innovative curriculum with industry standards.

---

**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 Healthcare Degrees & Certificates Awarded

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Certs. of Applied Sci</td>
<td>47</td>
<td>71</td>
<td>62</td>
<td>68</td>
<td>69</td>
<td>88</td>
<td>41</td>
<td>87%</td>
</tr>
<tr>
<td>Associate Degrees</td>
<td>335</td>
<td>445</td>
<td>508</td>
<td>513</td>
<td>594</td>
<td>521</td>
<td>186</td>
<td>56%</td>
</tr>
<tr>
<td>Bachelor's Degrees</td>
<td>212</td>
<td>246</td>
<td>267</td>
<td>317</td>
<td>336</td>
<td>356</td>
<td>144</td>
<td>68%</td>
</tr>
<tr>
<td>Master's Degrees</td>
<td>52</td>
<td>81</td>
<td>95</td>
<td>158</td>
<td>161</td>
<td>145</td>
<td>93</td>
<td>179%</td>
</tr>
<tr>
<td>Professional Degrees</td>
<td>66</td>
<td>172</td>
<td>189</td>
<td>213</td>
<td>230</td>
<td>245</td>
<td>179</td>
<td>271%</td>
</tr>
<tr>
<td>Doctoral Degrees</td>
<td>1</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>713</td>
<td>1,017</td>
<td>1,121</td>
<td>1,269</td>
<td>1,390</td>
<td>1,356</td>
<td>643</td>
<td>90%</td>
</tr>
</tbody>
</table>

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

**Objective 2.1.2**

Increase job placement rates

**Metric 2.1.2**

Percentage of Resident Graduates Entering Montana’s Workforce

<table>
<thead>
<tr>
<th>2013-14 Graduates Employed Within One Year of Graduation</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 1 year certificates</td>
</tr>
<tr>
<td>-----------------------</td>
</tr>
<tr>
<td>83.0%</td>
</tr>
</tbody>
</table>

- In 2014, 79% of resident students graduating from the MUS found employment in Montana within one year of graduation, up from 74% in 2009.
Goal 2: Workforce & Economic Development

System Initiatives:

- **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.

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

Updated June 2016

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 CCs)

![Graph showing degrees and certificates awarded by MUS 2-year colleges from 2004-05 to 2014-15]

- **Associate Degrees**
- **Certificates of Applied Science**

2003-04: 855
2004-05: 99
2005-06: 1449
2006-07: 290
2007-08: 1449
2008-09: 290
2009-10: 1449
2010-11: 290
2011-12: 1449
2012-13: 290
2013-14: 1449
2014-15: 290

Updated June 2016
MUS Strategic Plan

Research & Development

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

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: Jan. 2016

MUS Research & Development Expenditures by State, 2014

Goal Statement

Objectives 2.2

Research & Development

Metric 2.2.1

Research & Development Expenditures by State, 2014

source: National Science Foundation (NSF)

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

MUS Research & Development Expenditures by Institution

Objective 2.2.1

Increase technology licenses with Montana businesses

Metric 2.2.1

MUS Technology Transfer Activity

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
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

<table>
<thead>
<tr>
<th>Year</th>
<th>Graduate Student FTE</th>
<th>% of Total MUS FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY04</td>
<td>3,094</td>
<td>8.6%</td>
</tr>
<tr>
<td>FY05</td>
<td>3,070</td>
<td>8.7%</td>
</tr>
<tr>
<td>FY06</td>
<td>3,029</td>
<td>8.5%</td>
</tr>
<tr>
<td>FY07</td>
<td>3,017</td>
<td>8.5%</td>
</tr>
<tr>
<td>FY08</td>
<td>3,112</td>
<td>8.8%</td>
</tr>
<tr>
<td>FY09</td>
<td>3,127</td>
<td>8.8%</td>
</tr>
<tr>
<td>FY10</td>
<td>3,287</td>
<td>8.4%</td>
</tr>
<tr>
<td>FY11</td>
<td>3,427</td>
<td>8.5%</td>
</tr>
<tr>
<td>FY12</td>
<td>3,333</td>
<td>8.3%</td>
</tr>
<tr>
<td>FY13</td>
<td>3,291</td>
<td>8.3%</td>
</tr>
<tr>
<td>FY14</td>
<td>3,320</td>
<td>8.4%</td>
</tr>
<tr>
<td>FY15</td>
<td>3,287</td>
<td>8.4%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Graduate Degrees</td>
<td>1113</td>
<td>1372</td>
<td>1523</td>
<td>1601</td>
<td>1611</td>
<td>1509</td>
<td>1682</td>
</tr>
<tr>
<td>Graduate Degrees per 100 Graduate Student FTE</td>
<td>39.5</td>
<td>41.7</td>
<td>44.4</td>
<td>46.8</td>
<td>48.3</td>
<td>45.8</td>
<td>50.7</td>
</tr>
<tr>
<td>% STEM Degrees (Narrow)</td>
<td>18%</td>
<td>14%</td>
<td>14%</td>
<td>13%</td>
<td>12%</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>% STEM Degrees (Broad)</td>
<td>34%</td>
<td>39%</td>
<td>43%</td>
<td>39%</td>
<td>48%</td>
<td>48%</td>
<td>44%</td>
</tr>
</tbody>
</table>

1) Includes master’s, doctoral, and professional degrees.
2) Source: MUS Data Warehouse


Updated: Mar. 2016
IT Strategic Directions
In order to meet the three primary goals outlined in the Board of Regents’ Strategic Plan, the Montana University System will strive to implement the following Information Technology Strategic Directions:

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

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

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

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

**System Initiatives:**

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

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

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

---

**Metric 3.2.1**

**Total Educational Revenue per Student FTE, FY15**

Public Institutions

Revenue = *Net* Tuition + State/Local Approps

![Graph showing total educational revenue per student FTE for various states.](http://www.sheeo.org)

In 2015, total educational revenue per student FTE in Montana ranked 39th in the nation, up from 42nd in 2005 ($8,033 per student).

**Metric 3.2.2**

**Expenditures by Program**

Current Unrestricted Expenditures, Ed Units Only

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Instruction</td>
<td>53%</td>
<td>54%</td>
<td>52%</td>
<td>49%</td>
<td>48.2%</td>
<td>48.4%</td>
<td>48.8%</td>
<td>50.2%</td>
</tr>
<tr>
<td>Research</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1.0%</td>
<td>1.5%</td>
<td>1.1%</td>
<td>0.8%</td>
</tr>
<tr>
<td>Public Service</td>
<td>0%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>0.9%</td>
<td>0.9%</td>
<td>0.9%</td>
<td>0.9%</td>
</tr>
<tr>
<td>Academic Support</td>
<td>11%</td>
<td>11%</td>
<td>12%</td>
<td>12%</td>
<td>11.6%</td>
<td>11.8%</td>
<td>11.9%</td>
<td>11.6%</td>
</tr>
<tr>
<td>Student Services</td>
<td>9%</td>
<td>9%</td>
<td>7%</td>
<td>8%</td>
<td>8.2%</td>
<td>8.8%</td>
<td>8.7%</td>
<td>8.3%</td>
</tr>
<tr>
<td>Institutional Support</td>
<td>10%</td>
<td>9%</td>
<td>9%</td>
<td>10%</td>
<td>8.9%</td>
<td>8.5%</td>
<td>8.6%</td>
<td>8.2%</td>
</tr>
<tr>
<td>Operation and Maintenance</td>
<td>13%</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
<td>12.6%</td>
<td>11.3%</td>
<td>10.9%</td>
<td>10.9%</td>
</tr>
<tr>
<td>Waivers &amp; Scholarships</td>
<td>2%</td>
<td>4%</td>
<td>7%</td>
<td>8%</td>
<td>8.6%</td>
<td>9.0%</td>
<td>9.1%</td>
<td>9.1%</td>
</tr>
</tbody>
</table>

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

*FY 15 Actual:* Instruction = 48.8%; Inst + AcSup+ StudServ= 69.4%

*FY 16 Budget:* Instruction = 50.2%; Inst + AcSup+ StudServ = 70.1%
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 2012, more than 10,000 courses in over 60 disciplines have gone through the Common Course Numbering process. This represents 100% of the undergraduate courses in the MUS.

Goal Statement

Deliver efficient and coordinated services.

Objective 3.3.1

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

Metric 3.3.1

MUS Transferability Initiative – Common Course Numbering

a. All undergraduate courses in the Montana University System will go through the process of common course numbering (CCN)

   By the end of Spring 2012, all undergraduates courses in the MUS will have gone through the CCN process (10,000 courses in more than 60 disciplines).

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

   See BOR Policy 301.5.5 – Equivalent Course Identification and Numbering

c. Common course numbering will result in a transparent computerized program that demonstrates transferable courses across the university system

   Link to Common Course Numbering Transfer Guide

New Transfer Student Enrollment Between MUS Institutions

Updated: June 2016
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 – FY16 and FY17

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. Within this set of metrics, retention rates and completion numbers are measured for all MUS campuses. Degree counts in graduate programs and research expenditures are included in the flagship campus measurements, while early college enrollment of high school students coupled with a menu consisting of transfer rates, success in developmental education, credit accumulation, and licensure/exam pass rates round out the metrics for 2-year campuses. For all campuses, special weighting will be applied for Pell-eligible students (low income), American Indian students, nontraditional-age students, and veterans.

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

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

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

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

4. Community College Programs (College!Now)
   - Increase utilization, enrollment and degree production in community college programs by targeting:
     - Academically under-prepared
     - Pre-college students (dual enrollment)
     - Non-traditional students (25+ yrs.)
   - Clarify and promote the community college mission in Montana and role within the MUS by:
     - Rebranding the Colleges of Technology
     - Defining regional hubs with differential tuition policy, program delivery, etc.
5. Need-based Financial Aid
   ➢ Work to develop strategies to reduce unmet student need
   ➢ Increase the amount of need-based student aid

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

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

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

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

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

Regents’ Workgroup Members

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MUS Strategic Plan
Success Agenda (cont.)
(Appendix A)