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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:

- 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: 12/3/2019
MUS Strategic Plan

Retention & Completion

Goal Statement
Prepare students for success in life through quality higher education

Objective 1.1.2
Increase retention rates within the Montana University System

Metric 1.1.2
MUS Retention Rates
Percentage of First-time, Full-time Freshmen Returning for a Second Year of Enrollment in the MUS; source: FTF Dashboard, OCHE

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

Action Steps
1. Campus Planning: Develop campus plans for implementing supports to accelerate academic progress, remove financial barriers to attendance, and increase students’ purpose and belonging.

2. Serve Students: Enroll 300 Pell-eligible students at three MUS campuses in the pilot program in Fall 2020.

3. Rigorously Evaluate: Rigorously track student progress, comparing program students to similar students not selected to participate.

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

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

Objective 1.2.2

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

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 1:**
Access & Affordability

**System Initiatives:**

**Tuition Freeze:**
- Freeze on tuition for 12 out 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.

**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 |
|---|---|---|---|---|---|---|---|---|---|
| % of Freshmen, Under-represented Minorities | 9.2% | 9.4% | 10.7% | 12.5% | 12.8% | 13.2% | 14.1% | 15.3% | 14.8% |
| % of Freshmen from Low-income Families | 35.9% | 40.5% | 41.8% | 39.6% | 37.4% | 34.3% | 32.9% | 29.0% | 30.9% |

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

<table>
<thead>
<tr>
<th>Term</th>
<th>12-13</th>
<th>13-14</th>
<th>14-15</th>
<th>15-16</th>
<th>16-17</th>
<th>17-18</th>
<th>18-19</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>2,211</td>
<td>2,872</td>
<td>1,189</td>
<td>2,008</td>
<td>2,247</td>
<td>1,413</td>
<td>1,882</td>
</tr>
<tr>
<td>Yes</td>
<td>2,269</td>
<td>2,502</td>
<td>3,198</td>
<td>4,893</td>
<td>5,682</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Updated: July 2019
### 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 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

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>
<th>% of Total MUS Headcount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2005</td>
<td>10%</td>
<td>26%</td>
</tr>
<tr>
<td>Fall 2006</td>
<td>10%</td>
<td>26%</td>
</tr>
<tr>
<td>Fall 2007</td>
<td>10%</td>
<td>26%</td>
</tr>
<tr>
<td>Fall 2008</td>
<td>10%</td>
<td>26%</td>
</tr>
<tr>
<td>Fall 2009</td>
<td>10%</td>
<td>26%</td>
</tr>
<tr>
<td>Fall 2010</td>
<td>10%</td>
<td>26%</td>
</tr>
<tr>
<td>Fall 2011</td>
<td>10%</td>
<td>26%</td>
</tr>
<tr>
<td>Fall 2012</td>
<td>10%</td>
<td>26%</td>
</tr>
<tr>
<td>Fall 2013</td>
<td>10%</td>
<td>26%</td>
</tr>
<tr>
<td>Fall 2014</td>
<td>10%</td>
<td>26%</td>
</tr>
<tr>
<td>Fall 2015</td>
<td>10%</td>
<td>26%</td>
</tr>
<tr>
<td>Fall 2016</td>
<td>10%</td>
<td>26%</td>
</tr>
<tr>
<td>Fall 2017</td>
<td>10%</td>
<td>26%</td>
</tr>
<tr>
<td>Fall 2018</td>
<td>10%</td>
<td>26%</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

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

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

Workforce Development

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

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

**Metric 2.1.1**

<table>
<thead>
<tr>
<th>MUS Degrees Awarded in STEM Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Science, Technology, Engineering, &amp; Math (STEM)</td>
</tr>
<tr>
<td>45.0%</td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010-11</td>
<td>76.9%</td>
</tr>
<tr>
<td>2011-12</td>
<td>77.5%</td>
</tr>
<tr>
<td>2012-13</td>
<td>77.5%</td>
</tr>
<tr>
<td>2013-14</td>
<td>78.8%</td>
</tr>
<tr>
<td>2014-15</td>
<td>79.6%</td>
</tr>
<tr>
<td>2015-16</td>
<td>80.0%</td>
</tr>
<tr>
<td>2016-17</td>
<td>78.9%</td>
</tr>
</tbody>
</table>

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

- Certificates of Applied Science
- Associate Degrees

Updated July 2019
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

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

Metric 2.2.1

Research & Development Expenditures by State, 2017

source: National Science Foundation (NSF)

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

MUS Sponsored Project Expenditures

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

source: MUS Annual Research Report
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.

Updated: July 2019
MUS Strategic Plan

Information Technology

Goal Statement

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

IT Strategic Directions

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

1. **Enterprise Information Systems**

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

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

2. **Network Connectivity**

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

3. **Data Warehousing**

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

System Initiatives:

Shared Services

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)

- **US**: $13,630
- **MT**: $12,498


**Metric 3.2.2**

MUS Expenditures by Program Area

Current Unrestricted Expenditures, source: BUD 220

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Instruction</td>
<td>54%</td>
<td>56%</td>
<td>55%</td>
<td>53%</td>
<td>54%</td>
<td>54%</td>
<td>54%</td>
</tr>
<tr>
<td>Research</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Public Service</td>
<td>0%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Academic Support</td>
<td>12%</td>
<td>12%</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
<td>12%</td>
<td>12%</td>
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<tr>
<td>Student Services</td>
<td>9%</td>
<td>9%</td>
<td>8%</td>
<td>9%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Institutional Support</td>
<td>10%</td>
<td>9%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>O &amp; M</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
<td>12%</td>
<td>12%</td>
<td>13%</td>
</tr>
</tbody>
</table>

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

Transferability

Goal Statement
Deliver efficient and coordinated services.

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

Metric 3.3.1
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.”

<table>
<thead>
<tr>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neither Agree Nor Disagree</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.0%</td>
<td>5.9%</td>
<td>10.9%</td>
<td>45.8%</td>
<td>35.4%</td>
</tr>
</tbody>
</table>

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.”

<table>
<thead>
<tr>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neither Agree Nor Disagree</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.8%</td>
<td>7.1%</td>
<td>9.7%</td>
<td>46.5%</td>
<td>34.9%</td>
</tr>
</tbody>
</table>

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

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.

Goal 3:
Efficiency & Effectiveness

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

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 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 of 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.