



A. Written Report Summary:

1. Purpose:

The O'Connor Center for the Rocky Mountain West is an applied, cross-disciplinary regional studies, public education, and community outreach program of The University of Montana. The Center's mission is to serve as a resource for people in the state and region to better understand the region's past and present and to explore aspirations for its future.

2. Objectives:

To carry on and participate in array of programs and activities, such as conferences, and speaker sponsorships, that provide public education and, in some cases, leadership development, on important issues and affairs in the region's growth and development.

To produce a variety of informational material, such as books, articles, news pieces, web-based materials, and other publications that advance understanding of the region's history and culture as well as the challenges and opportunities for the region's future.

To study the region's rich history and current transformation as well as to convey insights and analyses gained from this study to others in the region, including key decision makers.

To produce and maintain databases and information systems that can be used by the Center's personnel and others in order better to understand important changes occurring in the region's economy and society.

To establish within The University of Montana educational and academic focuses on regional history, culture, and contemporary society. The Center shares its resources with other departments at UM and with students to enhance the understanding of the Rocky Mountain West and Montana's place in the larger region. This includes offering an annual course on "Regionalism in the Rocky Mountain West" (currently cross-listed by UM's departments of History and Geography).

To provide an academic home for senior staff members who bring experience and expertise to the Center's mission and its multiple areas of focus and who can take this work both into the classroom and into the community and larger region.

To serve as a readily-accessible, university-based resource for decision makers and communities throughout the region as they attempt to understand and address the needs and opportunities of the community and region.

3. Activities:

The Humanities and Culture program produces public programs and conferences on a regular basis. In the last year, personnel at the Center have had a book ([Julius Seyler and the Blackfeet: An Impressionist in the American West](#)) accepted by the University of Oklahoma Press, submitted a chapter-length article

("A Point of Entry: The Blackfeet Adoption of Walter McClintock") to the University of Oklahoma Press, advised on and co-sponsored a conference on Blackfeet history, and co-sponsored with UM's Department of History the sixth annual Hammond Lecture in Western and Environmental History.

The Regional Economy program is an applied research and educational effort focused on building a better understanding of the large forces shaping economic change in the region and how this change translates into the lives of people in communities within the region. With consolidation or decline in many of the region's traditional industries, like mining, ranching, and logging, a new economy is emerging in the region, and the Center has become a resource for community and regional leaders coming to terms with these changes.

A major achievement of this program is the design and development of a comprehensive database system for the analysis of sub-regional and local economic change. The Regional Economic Assessment Database (READ) is used by the community and regional planners throughout the region. This program has completed a wide range of studies and reports for federal land state agencies, foundations, non-profit organizations, and local community development organizations.

In the last year, personnel at the Center completed a funded study for First Interstate Bank of billings (Regional Assessment of the FIB Region and Sub-market Areas), completed a funded study for the Great Falls Economic Development Authority, engaged in a number of economic development projects, and written a chapter ("Sustaining Community Leadership Learning – Recent Experiences in Montana, U.S.A.") in Building Strong communities – Connecting Research, Policy, and Practice, published by the National Institute for Adult Continuing Education in Leicester, UK. Members of the Center have given sixty presentations and speeches at meetings, forums, and conferences throughout the state and region.

Personnel involved with policy studies at the Center are also heavily involved in the daily production of Headwater News, a web-based service that assembles news daily from newspapers across the region. Perspective pieces and other types of more-in-depth articles are regularly added to these news items.

Senior personnel at the Center are involved in many different types of activities.

Dr. Larry Swanson became director at the beginning of fiscal year 2006 (July 1, 2005). He has had lead responsibilities for the capital campaign for the Center, which reached its goal of raising \$1 million to establish a partially endowed senior fellow position at the Center. Swanson worked with Jim Scott of First Interstate BancSystem to create a "Scott Endowed Senior Fellow in Regional Economy" at the Center. Swanson also engaged in several funded research projects and has given guest lectures in several departments, most notably Geography.

Professor William Farr, the associate director of the Center and head of programming in history and the humanities, has approximately one quarter of his FTE dedicated to the Center. He organizes several forums and visiting speakers each year. He helps organize and coordinate the course in "Regionalism and the Rocky Mountain West." He recently completed a book on the work of Julius Seyler.

Doug Lawrence, computing and database manager for the Center, maintains the web-based Regional Economic Assessment Database. He also teaches in the computer science department.

Shellie Nelson is editor of Headwaters News. Jeannie Thompson, an administrative assistant, manages and coordinates functions in the office and handles financial and personnel matters. Gloria Phillip is a part-time assistant who works in the humanities program.

4. Other organizations involved

While the Center has had an advisory board for much of its history, it has not had a formal advisory board for the last four or five years. It has reviewed the function of an advisory board and reconstituted its advisory board. The new board met early in 2009. The primary focus of the

new board will be fund raising. Members of the board have been named by President Dennison. The reconstituted board consists of 5 people from outside the university and 3 from within the university. Membership from within the university includes the vice president for research and development, the provost, and the president.

5. Reporting line:

The O'Connor Center is headed by a director, who reports directly to the university's vice president for research and development, Dan Dwyer. Senior staff of the Center annually submit reports to the Center's director, and these are then submitted to the vice president for research and development along with a report of overall activities of the Center.

6. Relationships with institutional mission and contribution to academic programs:

The O'Connor Center contributes to each of the university's core purposes. Its personnel teach at the university in a number of departments, adding content to undergraduate and graduate courses. The Center engages in a wide range of research and study projects and makes the findings available to the state and region through a variety of venues. The Center's personnel contribute to public outreach and community service programming.

The center has made significant changes in personnel, in large part in response to past recommendations from ECOS and the Senate. The Center is committed to greater coordination with academic departments at UM.

7. Similar programs:

Many other universities in the region and nation have similar programs to that of the O'Connor Center. Past reports have listed similar programs in the state and region.

8. Budget:

The primary cost of operating the Center is the salaries of staff members and associated costs. The overall budget for FY 2006, the time of the last review by ECOS, was \$747,000. The budget for FY 2009 is reduced to \$605,000 as a result of planning actions and personnel changes. The single largest source of funding for FY 2006 was UM's Research Office, which provided \$284,000, or 38% of the Center's budget. Most of that funding went to support two of the senior fellow positions (Pat Williams and Bob Brown). Funds from the Research Office also partially supported two other senior positions at the Center. Funding from the Research Office has been steadily reduced in recent years. From \$284,000 in FY 2006, it has been reduced to \$110,000 in FY 2009. The Center's director maintains that will be reduced further in FY 2010.

In June 2008, the Center's endowments stood at over \$3.8 million.

In FY 2006, state funds accounted for the fourth largest source of funding (\$102,000). Some of that went to Swanson's salary. In FY 2009, the state funds going to the Center amounted to \$112,294. Of that, \$52,990 went to Swanson's salary, and \$26,278 went to benefits for Swanson, Thompson, and Lawrence.

Funding from the Research Office has been significantly reduced. The director indicates a plan to build its endowment and to continue to reduce funding from the state and the Research Office. In FY 2008, for example, the Research Office provided \$280,966. In FY 2009, the Research Office provided \$110,179. All of that went to contribute to the salaries and benefits of the three senior fellows. By the end of this year, all three senior fellows will have left the Center. Brown and Kemmis have already left, and Williams was given emeritus status by the Board of Regents at their most recent meeting. Williams will continue at UM on a teaching contract and not as an employee of the Center. These personnel changes will result in considerable salary savings.

B. Review and Approval Process

2. The Faculty Senate through its Chair, who in turn shall distribute it to ECOS and other committees, and approve or disapprove the proposal by a vote of the Senate.

Review in terms of Scope as stated in academic policy 100.0

To provide instruction, scholarship, or service to the University, state or world by: (1) focusing attention on an area of strength and/or addressing a critical issue, or (2) facilitating collaborative, multi-disciplinary endeavors to combine resources from several programs or institutions to address issues of common interest.

Review in terms of the University's mission.

- Comments:

In its last review, ECOS questioned the common use of "opportunity hires." ECOS found it "unclear as to what extent such 'opportunity hires' are consistent with the goals and objectives of the Center." Further, based on reporting from the Center, the last ECOS report indicated that the senior fellows would not be replaced as they retired or otherwise left the Center. The Center responds that "all of the persons now holding these positions will be retiring or otherwise leaving the Center in the current fiscal year. Hiring of senior personnel at the Center in the future will be done through normal hiring procedures . . . and when possible in full consultation with cooperating academic departments at UM." In addition, the Center indicates that "only persons with full academic credentials will be ordinarily considered for Center positions."

The Center reports that all of the opportunity hires have left or will be leaving the program. This will result considerable salary savings. The Center does not plan to replace any of the "persons in these positions, per se." The Center is working on raising \$1 million partially to endow a position in history to replace Bill Farr when he retires. Further, the Center is committed to do so in cooperation with the History Department. Beyond that, the Center plans to add permanent senior fellow positions only when it is able to support such positions with a \$1 million endowment. The Center also pledges that, as these positions become available, it will work closely with appropriate academic departments at UM in making hires.

ECOS does not question whether the center provides activities that further the university's mission. It does, however, question the centrality of those contributions, and, given the state and university funds put in to the Center, whether those contributions constitute the wisest use of state and university funds. This is particularly relevant, because the director of the Center acknowledges that the plan currently in place does not provide for "total" self-sufficiency, something that ECOS has repeatedly stated should be the Center's goal. The director reminds ECOS that "very very few academic centers, institutes, and special programs can operate with total self-sufficiency in funding." Further, the Center does intend to reduce the proportion of its funding that comes from UM.

The Center has reduced its funding from state and university sources from \$386,000 in FY 2006 to \$241,000 in FY 2009. This signifies progress. Nevertheless, it still represents a major commitment of state and university money. Even given the current state of the economy, the stock market, and therefore Foundation accounts, the Center maintains that it will be able to maintain current levels of activity. ECOS hopes to see the Center move further in the direction of self-sufficiency.

- Does ECOS/Faculty Senate consider this center controversial?

In its last report, ECOS found the Center "more, rather than less controversial." That conclusion was based, in large part, on the Center's dependence on state and university funds. The report also urged the Center to "exercise more care in disassociating the university from partisan activities." The departure of three senior fellows has largely addressed concerns relating to "partisan activities;" similarly, their departure goes some distance to addressing concerns about the dependence on state and university funds. Nevertheless, ECOS believes that such concerns

merit close monitoring.

- Is the relationship with academic units beneficial?

In its last report, ECOS found “a problem when a Center Fellow charges a department for teaching a course.” ECOS believes that the departure of three senior fellows (and their eventual replacement by hires made in consultation with existing departments) will resolve this matter.

- Is the program revenue neutral or does it consume more resources than it generates? If so, is the use of University resources justified?

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The program is not revenue neutral. In its last report, ECOS questioned whether the level of funding justified the substantial amount of funding from the university and the state the Center receives. While the Center has made significant efforts to address such concerns, they remain considerations.

- Is the entity making progress toward objectives?

ECOS sees continued progress. The Center has made strides toward self-sufficiency. Given the current shortage of resources on campus, ECOS would like to see self sufficiency on the part of the Center. At the very least, continued progress toward that end will be most welcome.

Recommendation:

ECOS recommends another review in three years, with approval at that time made on an assessment of the Center’s progress toward achieving the goals the Center has set for itself and the objectives ECOS has urged on the Center.

Justification:

The last report by ECOS expressed disappointment with the Center’s progress toward self-sufficiency. The Center has made significant strides, but it has fallen short of self-sufficiency. ECOS has some concern that the current economic climate does not augur well for the Center’s ability to achieve the stated goals in the next two years. The Center’s UM Foundation accounts have not fared nearly so well as the FIB stock accounts.