



**STRATEGIC PLAN**  
**UM 2020: BUILDING A UNIVERSITY**  
**FOR THE GLOBAL CENTURY**

**Submitted by:**  
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**University Planning Committee**

*2014*

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## INTRODUCTION

The University of Montana Strategic Plan sets forth the mission, vision, essential values, strategic issues, objectives, actions, and indicators that will guide the University's journey from 2012 through 2020. This plan is consistent with, and has been developed to support, the goals of the Montana University System Strategic Plan. The University of Montana Strategic Plan is a living document that will be renewed annually through an ongoing, participatory, and transparent planning process.

The Plan also identifies specific priorities and executable actions prior to each biennium. These are outlined in the final section of the plan: Biennial Priorities. Therefore, in addition to describing the strategic issues and objectives that inform the strategic direction of the University, this edition of the plan highlights actions to be accomplished for the 2014-2015 biennium.

Adequacy of resource allocation and the effective application of institutional capacities are integral to the accomplishment of the University's mission. The plan therefore reflects the interdependent nature of the University's operations, functions, and resources, including not only instruction and research, but also infrastructure and support functions. The scope of the plan includes, but is not limited to:

- Institutional goals and priorities;
- Programs;
- Enrollment;
- Fiscal resources;
- Human resources;
- Fundraising priorities;
- Capital resources, including debt financing and philanthropy;
- Buildings (classrooms, labs, office, special use, event, and support space); and
- Information technology (instruction and research technology, computers, networks, enterprise systems, and linkage to external and shared data sources).

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## DESCRIPTION OF THE UNIVERSITY OF MONTANA-MISSOULA

The University of Montana (UM) is one of two doctoral research universities in Montana and serves as the flagship of four affiliated campuses. For more than a century, it has maintained a liberal arts tradition as the foundation for undergraduate, professional, and graduate education. Breadth of programming and a solid interdisciplinary foundation foster the critical thinking and integrative problem solving skills needed by 21<sup>st</sup> century citizens.

### *INSTITUTIONAL CONTEXT*

Located in the second-largest and most diverse urban center in the state, UM offers programs ranging from one-year certificates to doctorates. The University flourishes in a setting that combines international cosmopolitanism, cultural diversity, social awareness, natural wilderness, and scenic beauty. Capitalizing on its proximity to the northern Rocky Mountains, the University has developed world-class programs related to the environment. Human health and development provide primary emphases in biomedical sciences and related programs. As a major center for the arts and culture in Montana, UM nurtures artists, performers, and writers. Students study a rich array of cultures through academic programs, special institutes, and more than 100 student/faculty exchange agreements. The University of Montana is further committed to meeting societal needs through strong programs in business, forestry and conservation, education, journalism, the arts, health professions, and law. It takes pride in the engagement of its students beyond the campus. Indeed, the articulation of programs responsive to the challenges and demands of local, national, and global communities continues to set UM apart. UM maintains an Office for Civic Engagement and is home to the Montana Campus Compact, part of a national coalition dedicated to promoting community service, civic engagement, and service learning in higher education. UM's emphasis on student engagement has earned it the Community Engagement Classification by the Carnegie Foundation for the Advancement of Teaching and a listing on the national President's Higher Education Community Service Honor Roll. UM has significantly enhanced its research and creative profile over the last 20 years, with substantial investment coming from sources other than state appropriations. The UM Foundation works with the University to develop private resources for the campus, its staff and students. The University's many outreach activities provide a great resource to the state and community and include athletic events, art events and tours, partnerships with state, regional, and tribal agencies, and involvement with K-12 education.

Enrollment has weakened, with a decrease of about 1,100 headcount over the past two years. Fall 2013 enrollment was 14,525 students, 67% at the baccalaureate level, 16% at the graduate level, and 17% in two-year and/or certificate programs. Of incoming students, 65% are Montana residents, the majority is women, and the average ACT score is 23. Fewer than one quarter of entering freshmen require developmental math, English, or both, and that number continues to decrease. In addition to the more than 2,000 first-time freshmen, nearly 991 undergraduate transfer students and 672 graduate students choose UM each year. In 2013, 1,917 baccalaureate, 499 master's, 49 research doctoral, and 297 professional doctoral degrees were conferred. In recent years the University has hired additional faculty, increasing from 734 in 2005 to 852 in 2013. Over 600,000 square feet of space have been added to campus facilities for student,

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academic, and research use, an increase of approximately 25% since 2000. Research programs have grown by a compound annual rate of 9.5 % since 1990. UM also provides an array of student services, including residence life programming, dining, student clubs and organizations, advising, counseling, recreation and intramural sports, Grizzly Athletics, lectures, cultural events, tutoring, financial aid, and work-study opportunities.

The Lumina Foundation's Delta Cost Project (2011) showed UM to be one of the *most cost-efficient* public research universities nationally. UM's level of expenditure per student is lowest in the nation for flagship universities and is 32% lower than the average for WICHE states. UM plans and allocates resources in a proactive and participative process called the Planning-Assessment Continuum, part of a comprehensive strategic resource management process that is critical to the University's ongoing success. Also, UM is preparing to move from a base-plus financial allocation model to a more responsibility-centered model in FY 2015.

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## MISSION, VISION, AND CORE VALUES

### *UM MISSION*

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

### *UM VISION*

The University of Montana will lead as a globally focused public research university that serves the state, nation, and world. Intrinsic to mission are the underlying values of **leadership, engagement, diversity, and sustainability**. These essential values underpin our preparation of graduates and contributions to society in the 21<sup>st</sup> century through high-impact teaching, research, creative scholarship, and service. The University of Montana will be recognized as a place of opportunity for those who study and work in a dynamic learning environment. It will be a place of vitality through its academic, cultural, and athletic performance. We will realize our mission and vision through continuous, intentional integration of planning, budgeting, implementation, and assessment. The University of Montana will drive economic, cultural, and social development of Montana and the Central Rockies.

### *CORE VALUES*

The University has identified four core values that drive every aspect of its mission and vision: Leadership, Engagement, Diversity, and Sustainability. These values both ground and inspire everything The University of Montana pursues, as expressed in the strategic issues.

#### **LEADERSHIP**

The University of Montana aims to produce graduates with leadership skills and potential, with the anticipation that they will become local, state, regional, national, and international leaders appropriate to their aspirations and experience. We expect our faculty members, staff, and administrators to be leaders in their areas of expertise and within their professional societies and organizations.

#### **ENGAGEMENT**

The University of Montana is committed to instilling a passion for discovery, learning, and service in its students and faculty, connecting curricular content, student life, and experiential learning opportunities with the principles and aspirations of societal and cultural contributions.

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As articulated in our Mission Statement, the University “seeks to educate competent and humane professionals and informed, ethical, and engaged citizens of local and global communities.”

## **DIVERSITY**

“The University of Montana seeks to enhance diversity by recognizing and embracing the differences in age, ideas and perspectives, disabilities, abilities, creed, ethnicity, gender identity, gender expression, veteran status, national origin, race, religious and spiritual beliefs, sex, sexual orientation, and the socioeconomic and geographic composition of its faculty, administrative professionals, staff, and students. In its effort to enhance diversity, The University of Montana recognizes that particular focused effort must be placed on including members of groups who have historically been subject to discrimination and are still underrepresented in the campus community.” UM Diversity Strategic Plan, 2009

## **SUSTAINABILITY**

The University of Montana models a pathway to economic, financial, environmental, and cultural sustainability in every aspect of mission fulfillment. It fosters principles of sustainability within the processes and cultures of the University, and it infuses issues of ecological, social, and economic sustainability into courses across the UM curriculum. Consistent with the broader concept of sustainability, the University’s initiatives ultimately seek to enhance students’ understanding of the interconnectedness of ecological, social, and economic issues.

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## STRATEGIC ISSUES

In this section of the plan, strategic issues are described, and objectives and indicators of success are identified. Strategic issues are essential elements that articulate the University mission. The strategic issues collectively encompass and individually manifest critical elements of the University's mission. Under each strategic issue, objectives are identified, along with verifiable indicators of achievement that form the basis for assessing the accomplishment of the objectives.

### PARTNERING FOR STUDENT SUCCESS

Student success is a top priority for The University of Montana. In 2008, the University adopted the *Partnering for Student Success* plan aimed at enhancing students' experiences and increasing student retention and graduation. The plan identifies six key objectives critical to student success in college and sets forth actions to promote a successful first year for entering freshmen and to address the needs of returning students. As part of the plan, UM created an Office for Student Success charged with developing, implementing, and coordinating initiatives to increase students' persistence toward graduation. UM seeks to improve students' success by addressing their preparedness for college-level work, improving their transition to college, providing an integrated early curriculum, increasing student engagement and support, and emphasizing faculty and staff development. One goal of the *Partnering for Student Success* plan is to reach an 80% first-year retention rate by 2016, to place UM in the top quarter of peer institutions. Collaboration to achieve these objectives is strong. For example, orientation activities, organized by Enrollment Services in collaboration with the Office for Student Success, provide students with the resources and instruction that enable them to benefit from the opportunities available on campus at the very start of their college careers. Faculty, staff, and students are well informed and supportive of the initiatives outlined in the plan. Since the inception of the plan, first-year retention has improved from 69% to 77%.

#### *Objectives:*

- Preparing K-12 students
- Transitioning to college
- Integrating the early college curriculum
- Engaging students
- Strengthening student support
- Emphasizing faculty and staff development

#### *Indicators of Success*

To measure achievement of this portion of its mission, the University compiles, analyzes, and reports key indicators for each objective, including academic preparation of incoming students, freshman success, integration, engagement, student support, and faculty and staff development. Objective measures of student success such as retention and graduation rates allow for trend analyses and comparison to national benchmarks, and provide longitudinal data to measure program improvement. Surveys and other instruments that capture students' perceptions help

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assess student engagement, the most accurate predictor of student success, while co-curricular opportunities and support services offered by the University indicate the degree to which the University is marshaling its resources to add value to the student experience and facilitate desired student outcomes.

- Incoming academic credentials (GPA, test scores)
  - Strategic Target: 3.5 GPA; 24 ACT
- Percentage of Montana high school students accepted into UM participating in a full college preparatory curriculum
  - Strategic Target: 75%
- Upper division retention rates
  - Strategic Target: 70%
- Freshman success (GPA and first-year retention rates)
  - Strategic Target: 3.25; 83%
- Declaration of major
  - Strategic Target: 100% by 45<sup>th</sup> credit hour completed;
- Enrollment in freshman seminars and experiential opportunities
  - Strategic Target: 50% of freshman class
- Six-year graduation rates
  - Strategic Target: 60% of freshman cohort
- Retention and graduation rates for students in two-year programs (Missoula College)
  - Strategic Target: 65% of cohort; 50% of cohort
- Participation in student success initiatives (e.g., tutoring, mentoring, early alert, Math Pilot, Study JAM, career counseling services, online training)
  - Strategic Target: 30% increase in utilization
- Provision of tailored services to meet diverse student needs
  - Strategic Target: 100% of students rating services satisfactory or better
- Availability of need-based financial aid
  - Strategic Target: Reduce unmet need by 50%
- Number of graduates by 2020
  - Strategic target: 3,200
- Two-year Program enrollment (Missoula and Bitterroot Colleges) by 2020
  - Strategic target: 3,000

## **EDUCATION FOR THE GLOBAL CENTURY**

The University's Academic Strategic Plan, endorsed by the Faculty Senate in 2009, identified the need to create a gateway to discovery experience focused on the challenges of the global century (a complex interconnected and analytically driven century) for all incoming students at each level of postsecondary education. At the same time, the University recognizes the need to support and strengthen foundational academic programs. For all students, curricula will focus on producing workers and leaders who make a difference in the cultural and economic fabric of Montana and the world.

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Two-year education must respond to local, regional, national, and global needs. Curricula must provide hands-on, practical experience with real-world applications, as well as developmental coursework to ensure that students are prepared to succeed in the college environment and in the field. Missoula College, UM's two-year unit, also provides academic certificates, two-year degrees, and college transfer programs for students desiring to enter baccalaureate programs.

In moving toward a complete Global Century baccalaureate model, a conceptual framework for the overall undergraduate academic experience has been developed to ensure that there is a context in which students can contemplate their overall education (focusing on interdisciplinary big questions or grand challenges that we face as a world society). This program is the Global Leadership Initiative, which in fall 2013 enrolled approximately 400 students in these cohorts. Its four components of big questions seminars, models of leadership, out of classroom experiences and integrative problem solving complement a student's four-year major-focused baccalaureate experience. Additionally, to ensure that there are opportunities for all students to put their education to work, both during their college career and post-graduation, an Office of Academic Enrichment has been created to coordinate learning experiences outside the classroom, and academic departments, Career Services, Internship Services, and Study Abroad work collaboratively to offer students opportunities to gain experience closely allied with their academic interests and to engage more immediately with the global society. This engagement involves international travel and virtual classrooms, connecting students and faculty globally. For high achieving baccalaureate students, UM offers special experiences through the Davidson Honors College.

At the graduate level, UM offers programs that capitalize on the unique location and intellectual and cultural resources of the campus and it has additional opportunities for interdisciplinary collaboration and scholarship. The University aspires to produce graduates who lead in all realms of society: creating cultural events and arts performances, engaging in leading-edge science, fostering entrepreneurship, creating new technologies, and serving society through educational, political, government, and business leadership.

*Objectives:*

- Strengthen foundational and nationally distinctive academic programs
- Generate responsive two-year programming
- Promote global engagement and leadership at the baccalaureate level
- Enhance discovery and innovation through two-year, baccalaureate and graduate education

*Indicators of Success*

To measure fulfillment of this portion of its mission, UM collects, analyzes, and disseminates information using a wide variety of indicators, ranging from numerical data (e.g., number and placement of graduates in the workplace) to more qualitative analysis of students' progress toward program-level learning outcomes. Effective two-year programming leads to job placement for students who complete a degree or other credential, requiring that the programs align with needs in the local, regional, and national communities. In addition, acquisition of

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learning outcomes can be measured with licensure exams as well as progress beyond the two-year degree. At the baccalaureate level, students who are engaged excel in the classroom and participate in co-curricular activities, meeting program- and institution-level learning outcomes. These students will apply their content knowledge, critical thinking, and problem solving abilities to address global and local issues. Strategic growth at the graduate level demands careful planning and implementation of programs that match the expertise of faculty and the needs of communities and students. Finally, the University must measure the impact it has on its students, and the subsequent impact its students and faculty have on the world, as indicated by a range of both direct and indirect criteria, including civic engagement, recognition and awards of distinction, and development of significant contributions or inventions.

- Existence of an active Program Review process
  - Strategic Target: 100% of academic programs evaluated on 7-year cycle
- Existence of program-specific learning outcomes
  - Strategic Target: 100% of academic programs publish learning outcomes
- Alignment of programs and placement of graduates
  - Strategic Target: 90% of graduates employed in discipline or allied field, or enrolled in advanced degree programs
- Transfer rates from two-year to four-year colleges and universities
  - Strategic Target: 75% of graduates in associate degree programs
- Enrollment in the Bitterroot College program
  - Strategic Target: 800 students (headcount)
- Enrollment of international students
  - Strategic Target: 600 students by 2020
- Diversity of students and faculty/contract professionals
  - Strategic Target: 10% students, 10% faculty/contract professionals
- Participation in co-curricular, study abroad, internship, undergraduate research and service learning activities
  - Strategic Target: 75% of undergraduate students
    - Undergraduate research: 3,900 students
    - Study abroad: 550 students
    - Internships: 950 students
    - Civic engagement: 9,000 students
- Curricular development in support of global action and responsibility
  - Strategic Target: 800 students enrolled in the Global Leadership Initiative
- Advanced degrees awarded
  - Strategic Target: 50% increase
- Graduate research and creativity that contribute to Montana's place in global and local contexts
  - Strategic Target:
    - 90% of doctoral students:
      - publish or co-author a scholarly article, monograph, or book,
      - present or co-author a paper/poster at a national or international conference, or
      - serve as co-investigator on an extramurally-funded research project

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- 100% of visual and performing arts students demonstrate their skills in prestigious performances
  - 5% of graduate students receive national or international recognition
  - Expansion of graduate program enrollment
    - Strategic Target: 500 new students
  - Increase number of institutionally and grant supported TAs/RAs and competitiveness of stipends
    - Strategic Target: 200 additional assistantships; stipends at or above national median

## **DISCOVERY AND CREATIVITY TO SERVE MONTANA AND THE WORLD**

Scholarship, research, and creative work are central to the lives of faculty, students, and staff, and to academic programming at The University of Montana. Expectations are strong for faculty to engage in leading-edge research and creative scholarship that result in publications, exhibitions, performances, and presentations. A deeply rooted belief at all levels within the University is that strong, active faculty scholarship is integral to the University's ability to offer high quality educational programs. The University's Mission Statement refers explicitly to the centrality of research and creative work in the University's programs. Therefore, The University of Montana supports research, scholarship, and creative work across the natural and physical sciences, social and behavioral sciences, arts, and humanities, and works to enhance opportunities for interdisciplinary connections. By fostering an entrepreneurial spirit in the community of research and technology, UM transforms discovery into application in ways that benefit the state, region, and nation. So, too, the University identifies programs of distinction from across the campus in order to stimulate the development of programs that are on the verge of national or world-class excellence and poised to move into this category. Research is an investment that enhances the intellectual vitality, the economic viability, and the teaching mission of the University. In addition, the scholarly, creative, and research activities and programs of faculty serve as a critical base for the University's diverse graduate and undergraduate programs by providing opportunities for students to learn content, methods, skills, values, and approaches of a discipline from faculty mentors and advisors who are leaders in their fields. Students have many opportunities to share their own research and creative work, such as exhibitions in the art gallery at the University Center, poetry readings, presentations at the annual UM Undergraduate and Graduate Student research conferences, and presentations at state-wide two year research conferences.

### ***Objectives:***

- Enhance contributions by faculty and students through research
- Expand knowledge and cultural richness through creative scholarship
- Advance today's discoveries to create tomorrow's products

Programs of discovery and creativity are essential to a vital learning environment and to ensuring that learning at all levels is at the leading edge of knowledge and practice. Both research and performance are critically important to UM.

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## *Indicators of Success*

The research, creative, and applied skills of the University's faculty and students represent critical components of the fulfillment of its mission, contributing to academic excellence, development of informed citizens, and cultural, social, and economic contributions to society. Faculty scholarship must be disseminated to make a contribution and its impact is recognized and indicated through extensive publication of journal articles, semi-technical and popular publications, books and book chapters, reports and technical papers, artistic presentations and exhibitions, documentaries and broadcast productions, presentations at professional meetings at other scholarly institutions, contributions to the functioning of governmental and other agencies, success in competitive proposals, and receipt of awards. The University of Montana provides for regular and systematic evaluation of faculty performance in order to ensure effectiveness in teaching, research, and creative work. These evaluations include measures of productivity, quality, and impact.

- Become a top tier research and graduate university (Carnegie Research Very High)
- Number and stature of publications, performances, and exhibitions
  - Strategic Target: 750 publications; 450 performances and exhibitions annually
- National and international awards and recognitions
  - Strategic Target: 10% of faculty receive national or international level awards each year
- Patents, invention disclosures, and license agreements
  - Strategic Target: 17 patents, 35 invention disclosures, and 6 license agreements
- Spinoffs and business start-ups
  - Strategic Target: 2 spinoffs/business start-ups
- Programs of National Distinction
  - Strategic target: 6 academic programs by 2020

## **DYNAMIC LEARNING ENVIRONMENT**

The University of Montana is consistently recognized as one of the most attractive and enticing campuses in the nation. Community and campus engagement literally means that the lives of the students, faculty, staff, alumni, and friends of the University are centered on the campus. People are drawn to UM by the challenge of academic rigor, richness of experience, beauty of and engagement with surroundings, and opportunities for lifelong learning, as well as by cultural and entertainment experiences. Possibilities range from sold-out athletic events that feature perennial championship teams, to galleries, campus theaters, and arenas filled to capacity for performances featuring local and world famous visual and performing artists. UM builds upon its "sense of place" in the Central Rockies with a vibrant and dynamic learning environment, where the natural surroundings are integrated into the curriculum. The inquisitive, engaged, and interactive nature of the community creates a discourse of activism, innovation, and scholarship across a spectrum of societal issues. The University delivers knowledge via both traditional classroom lectures and seminars, which are taught by world-renowned faculty, and utilizes high-speed data transmission to deliver web-based and video-based classes to on-campus, rural and place-bound

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learners. These classrooms reach out to surrounding communities with curricula specific to meet the needs of the local community. Regional outreach activities include partnerships ranging from RezNet (national, web-based Native American news media, sponsored by the School of Journalism) to the Montana Repertory Theatre (the largest touring dramatic troupe in the nation) and the award-winning Montana PBS. On campus, the University models sustainability, leadership, and diversity in its facilities and campus practices, its financial practices, its workforce and student body, and its culture. The Payne Family Native American Center (dedicated in 2010) is a good example of a space where students of diverse backgrounds mingle, interact, attend classes, study, receive services, and get to know each other in both formal and informal settings. It is sustainable in the LEED sense, and also in the sense of financial stability and community.

*Objectives:*

- People – Lead in recruiting, retaining, and developing the highest quality students, faculty, administrators and staff
- Programs – Provide programs of distinction, including outstanding athletic, cultural and entertainment opportunities, engage local to world-wide partnerships and connect programs to our unique location
- Infrastructure – Use technologies and practices that optimize the learning experience while modeling sustainability
- Culture – Inspire an atmosphere where engagement and passion for learning thrive
- Place – Integrate the character of the campus environment into discovery and instruction

Creating a dynamic learning environment is a multifaceted endeavor that involves actions in many different parts of the University.

*Indicators of Success*

This segment of our mission is characterized by a broad set of components, including provision of technology and infrastructure, experiential learning, partnerships, engaged faculty, staff, and students, and opportunities for community participation. As a result, the indicators are wide ranging. In order to realize our aspiration to become a university where learning is transformative and integrated into the fabric of student and community life, traditional assessment of learning outcomes at the program level is required, but not sufficient. To determine the effect of this campus in the lives of our community members, we must assess the learning environment itself, and its impact on students, faculty, and staff, as well as their consequent imprint on the global community.

Student and public perceptions will address the significance of specific activities in building a cohesive community. Standard measures of recruitment, retention, and development provide information about the success of the learning environment to engage the community. Tools that measure accessibility, sustainability, and innovation are critical to the achievement of our mission, vision, and essential values.

- Number of, and participation in, courses and programs that adopt experiential learning to interact with the local cultures and/or the natural environment

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- Strategic Target: One-third of programs include experiential learning component; 100% of students participate in experiential learning during their enrollment
  - Percent of facilities and learning spaces that are sustainable, accessible, and innovative
    - Strategic Target: 25% of existing facilities will be certified LEED-EBOM Silver and 60% will be accessible; 100% of new facilities will be accessible and LEED Silver or higher certified; 90% of classrooms and laboratories will be able to utilize technology with support that allows technological innovation to be sustained
  - UM hires its first choice in faculty
    - Strategic Target: 100%
  - National Scholar Recipients
    - Strategic Target: 12 annually
  - Student to faculty ratio
    - Strategic Target: 18:1 student to faculty ratio
  - Student engagement survey results
    - Strategic Target: 90% of seniors rate their educational experience as very good or excellent
  - Participation and perceptions of students and community members regarding outreach, cultural events, and access to lifelong learning
    - Strategic Target: 100% increase in participation; 90% of survey respondents rate these programs as very good or excellent
  - Number of new online course offerings and selected degree programs
    - Strategic Target: Top quartile of peer universities
  - Climate Action Plan operation and implementation
    - Strategic Target: 100 % Climate neutrality
  - Montana Digital Academy Enrollment
    - Strategic Target: 15,000

## PLANNING-ASSESSMENT CONTINUUM

The Planning-Assessment Continuum characterizes a cultural orientation of The University of Montana designed to facilitate desired outcomes, clarify the University's vision and mission, and communicate and demonstrate to internal and external stakeholders that the University is making the best use of its resources. The Planning-Assessment Continuum is both top down and bottom up. Executive leadership provides communication of mission and vision, clear and consistent processes, overarching mission-driven goals, equitably applied parameters, and rules enforcement, while faculty, staff, and students provide ideas, process improvements, work, action, and other vital contributions to the direction of the University. Important to the process are mechanisms that ensure transparency and meaningful, broad-based input and participation, including advisory committees, implementation teams, task forces, focus groups, and town hall discussions, as well as responsibility-centered budgeting. The process is integrated, transparent, and highly visible. The scope of these activities includes, but is not limited to:

- Institutional goals and priorities
  - Programs
  - Enrollment
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- Fundraising
  - Fiscal resources
  - Human resources
  - Capital resources, including debt financing and philanthropy
  - Buildings (classrooms, labs, office, special use, event, and support space)
  - Information technology (instruction and research technology, computers, networks, enterprise systems, and linkage to external and shared data sources)

*Objectives:*

- Link plans and resources
- Engage transparent and participative processes throughout the cycle
- Use data-driven decisions and goal-setting
- Gather objective and timely assessment of outcomes

*Indicators of Success*

The Planning-Assessment Continuum is the operational strategic issue for UM. All budgets and assessment processes are linked to the University's Strategic Plan.

- Alignment and integration of plans
  - Strategic Target: 100%
- Budget allocation by goals
  - Strategic Target: Comprehensive reporting of budget allocations /alignment by strategic issues and objectives
- Funding of new initiatives
  - Strategic Target: 1.5% of General Funds budget allocated to new initiatives annually
- Constituent representation of faculty, students, staff, academic and executive leaders, alumni, and community; openness of meetings
  - Strategic Target: 100% compliance in comprehensive representation
- Degree of online public access to strategic plans, operating plans, and budget documents and annual documentation of allocation/program decisions
  - Strategic Target: 100% compliance in online accessibility to strategic and annual operating plans, operating budgets, and annual sector and institutional assessment reports; 100% compliance in transparency of budget allocation decisions
- Annual update of the Strategic Plan, and subsequent budget allocations, based on environmental scan and institutional assessment
  - Strategic Target: 100% compliance
- Biennial updates of sector and program plans
  - Strategic Target: 100% compliance
- Transparent adjustment of current budgets as indicated by enrollment, revenue, and expense variation
  - Strategic Target: 100% compliance
- Annual publication of the Institutional Assessment Report (including UM Report Card)
  - Strategic Target: 100% compliance

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- Proportion of General Funds budget allocated to instruction, academic support, and student services
    - Strategic Target: 70% of General Funds budget
  - Proportion of General Funds budget allocated to contingency
    - Strategic Target: 2%
  - Student debt reduction through increased student financial education
    - Strategic Target: Reduce student debt by 25%

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## BIENNIAL PRIORITIES FOR 2015 AND 2016/2017

While The University of Montana Strategic Plan describes the University's aspirations through 2020, this statement of Biennial Priorities documents those aspects of the plan that will be the primary focus during 2015 and the 2016-2017 biennium, and identifies actions to be taken in order to make progress toward the longer term achievement of our mission and vision.

In the fall semester of 2013 the University experienced a gap between general fund revenue and expenditures. From fall 2011 to fall 2013 student head count declined more than 1,100 students, with a corresponding decline in student FTE. These declines have led to a decrease in revenue during a time when expenditures have increased one year and held steady the following year. The gap between revenues and expenditures can be eliminated by increasing revenue through student recruitment and retention, and other revenue enhancement activities, and by reducing expenditures to serve a reduced population of students.

Recognizing that a gap between revenues and expenditures cannot be sustained and that fewer students means there is less demand for a wide range of services, five special work groups composed of faculty, staff, students and administrators were formed in spring 2013 to develop ideas and recommendations for reform. The topics the five work groups addressed are:

- Academic programming
- Enrollment management
- Budget allocation
- Revenue enhancement
- Cost savings

Many of the priorities and actions identified for FY 2015 and the 2016-17 biennium are in response to the revenue-expenditure gap and to the recommendations of the work groups.

### *PARTNERING FOR STUDENT SUCCESS*

*The University will help its students succeed academically and personally so they graduate well-prepared for their careers or further education.* More specifically, the University seeks to improve student retention and graduation rates through improved preparation, comprehensive engagement, and enhanced student support. These priorities collectively contribute to the success of students as they address the challenges of a post-secondary education.

**In order to achieve these planned outcomes in Partnering for Student Success, we intend to:**

- Implement an aggressive recruitment program for freshmen, transfer and non-traditional students using evidence-based methods and best practices
- Implement the new admissions program
- Develop a strategic target for enrollment with specific priorities for target populations
- Stimulate K-12 Education for the Global Century
- Revise the Partnering for Student Success plan

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- Develop programming to improve second-year and upper-division retention using national best practices
  - Continue development of the Veteran's Center
  - Strengthen Disability Services for Students
  - Strengthen American Indian student services
  - Increase resident and non-resident merit-based scholarships and resident need-based scholarships
  - Develop scholarships for students who meet the rigorous college preparation core
  - Reform developmental education to eliminate its being a barrier to student success
  - Enhance services from the Registrar's Office.

### *EDUCATION FOR THE GLOBAL CENTURY*

*UM will offer an educational experience at all degree levels providing graduates the foundation to make positive impacts on a world that is increasingly interconnected.* The University has identified key elements of its mission that will contribute to student achievement in a competitive global economy. By strengthening relevant and rigorous curricula, as well as university resources, the University will graduate students who will emerge as productive workers and leaders in the cultural and economic fabric of Montana and the world.

**In order to achieve these planned outcomes in Education for the Global Century, we intend to:**

- Further integrate Missoula College into UM to ensure delivery of post-secondary educational opportunities
- Develop seamless Missoula College and other two-year associates-to-UM bachelor's degree programs (2+2); enhance progress from Missoula College to bachelor's degrees
- Collaborate and facilitate movement of students from Montana's tribal colleges to UM
- Adopt policies and mechanisms that facilitate interdisciplinary teaching and research
- Develop an overarching strategy for online course and program offerings
- Create new summer programs and opportunities across all age groups and interest areas
- Assess the educational value of a long winter session, including its programming and links to spring semester
- Focus on coupling student employment with learning outcomes
- Increase recruitment of nonresident and international students
- Increase diversity of faculty and staff
- Continue the Global Leadership Initiative with a fourth cohort and evaluate program success
- Facilitate the formation of faculty groups to develop proposals for federal training grants
- Develop additional partnerships with Montana businesses
- Build stronger relationships with state, federal, tribal, and municipal governments

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- Promote opportunities for and develop a process for increased study abroad.
  - Continue to hold “Celebrate Academics,” an annual event showcasing the quality of our educational programs and innovative approaches to teaching and learning.
  - Investigate and develop programming in contemporary theme areas such as brain science, data science and hospitality management
  - Adjust academic programming to continue to ensure foundational liberal education and globally relevant academic programming

### *DISCOVERY AND CREATIVITY*

*The University will transform discovery and creativity into knowledge, applications and experiences in ways that benefit the state, region, nation and world.* Within this critical aspect of its mission, the University will promote and cultivate a creative and research-intensive learning environment so that faculty and students may better serve and contribute to the society and economic ecosystems locally, regionally, and globally. Research and creativity are investments vital to the mission of the University and its aim in producing innovators and promoting exceptional scholarship.

**In order to achieve these planned outcomes in Discovery and Creativity to Serve Montana and the World, we intend to:**

- Continue research core facilities upgrade
- Develop a funding mechanism for maintenance of research equipment
- Aggressively pursue technology transfer efforts
- Increase stipends to national levels for TAs/RAs
- Increase the number of RAs
- Coordinate the dissemination of information about intramural grants, contracts, and cooperative projects to promote interdisciplinary dialogue and proposal development
- Increase funding for underfunded areas such as Humanities and Fine Arts
- Stimulate the development of multifaceted and larger proposals as required by funding organization
- Work with faculty to strengthen the research infrastructure, including build-out of the Interdisciplinary Science Building;
- Strengthen “per-student” investment, allowing UM to carry out cutting-edge research and creative scholarship; and
- Continue to hold Innovation & Imagination, highlighting research and creative scholarships for the general public and our campus.

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## *DYNAMIC LEARNING ENVIRONMENT*

*UM will enhance its character as a place where people are passionate about learning, discovery and growth.* The University recognizes the vitality and energy it fosters on campus and within the surrounding community and region, and it will continue to promote an atmosphere of learning, engagement, and service, emphasizing the cultural richness of the North-Central Rockies. Moreover, it is the University's intent to continue to enhance this special place where a passion for learning is nurtured and empowered. For the biennium, the University's focus will be to identify and implement strategies to enhance facilities and campus practices to model sustainability, leadership, and diversity in its financial practices, its workforce and student body, and in its culture.

**In order to achieve these planned outcomes in promotion of the Dynamic Learning Environment, we intend to:**

- Increase FTE enrollment by 6% by fall 2016.
- Ensure continued competitiveness by strengthening UM human resources (faculty, staff, and administrators)
  - Hire faculty in targeted areas
  - Improve competitiveness of salaries
  - Reduce salary inversion and compression
  - Complete faculty line coverage for past and current EPSCoR, COBRE, and related positions
  - Increase professional development opportunities, including giving faculty training and access to the newest concepts and technologies for pedagogy and research
  - Develop a systematically and strategically based justification process for all new and renewable positions on campus and develop plans to reallocate faculty and staff based on assessment of changing student enrollment
- Continue support of UM's long-range building plan
  - Plan and build a Missoula College facility
  - Establish a Learning Commons in the Mansfield Library
  - Construct an Academic Center for Athletes
  - Renovate Visual and Performing Arts facilities
  - Begin implementation of the Smart Building Initiative
  - Build-out the ISB third and fourth floors
  - Obtain funding to build the Montana Museum of Art and Culture, Alumni, and Welcome Center
  - Finish building the basement of the Payne Family Native American Center (Cobell Initiative)
  - Build the Gilkey Executive Education Building
  - Build a women's softball facility on South Campus

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- Enhance IT facilities and services
    - Extend bandwidth to the Missoula College West Campus
    - Improve wireless access on campus
    - Develop a first technology module unit
    - Purchase a new library management system for all MUS campuses
    - Assess Banner capabilities and transition to a more functional Banner implementation
  - Enhance campus safety initiatives
    - Become a model of campus security and responsiveness to student safety needs.
    - Fund a sexual assault prevention coordinator position
    - Enhance campus emergency preparedness
    - Meet requirements identified in the DOJ and NCAA settlements
    - Launch a women’s softball program
  - Improve sustainability and accessibility of campus facilities
  - Align marketing and branding for the University of Montana; tell our story
  - Enhance internal and external communications, including social media outreach and regional and national news media outreach
  - Maintain investment in sustainability and commitment to climate action plan.

### *PLANNING-ASSESSMENT CONTINUUM*

*The University will model transparency, systematic communication and sound decision-making to ensure that resources are marshaled to achieve UM’s mission.* In the second biennium of the UM Strategic Plan, our focus remains on the continued implementation of the Planning-Assessment Continuum and its full integration into the decision-making fabric of the University.

**In order to achieve these planned outcomes in the Planning-Assessment Continuum, we intend to:**

- Implement a new budget allocation system for UM and bring expenditures in line with revenues
- Plan for and continue the Invest in Student Success campaign and begin implementation of a transformative capital campaign
- Allocate at least 1.5% of the General Funds budget to new initiatives
- Continue the evolution of Bitterroot College into a more comprehensive academic unit
- Work with the Montana Legislature to increase appropriations for higher education
- Continue to adopt performance-based allocation models and budgeting practices, where appropriate
- Strengthen IT sustainability and effectiveness

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- Produce annual assessment reports documenting the extent and array of sector assessment activity and highlighting critical outcomes against benchmarks or performance targets
  - Develop and adopt new business models for online and blended learning as well as summer and winter sessions
  - Examine possibilities for insourcing and outsourcing services such as vending, printing, and vehicle fleet
  - Create an integrated model for University Advancement (UM Foundation, Alumni Relations, and Integrated Communications)
  - Seek opportunities for operational efficiencies (e.g. one-stop shop for conference services).