

University of Montana
Academic Program and Administrative Services Prioritization
President Sheila M. Stearns' Recommendations
January 12, 2018

To: The UM Campus Community and Shared Governance Leadership

Recognition of Strengths, Platform for Growth

I hereby submit my recommendations for setting priorities at the University of Montana. These recommendations reflect primarily the work of the APASP Task Force as well as my well-informed professional judgment as the University's CEO. This concludes my review and Phase I of our ambitious work to set priorities for the University of Montana.

I. Background and Scope

I initially called for a prioritization initiative while addressing Faculty Senate on February 9, 2017. Shared Governance Groups (SGGs) followed in mid-February with resolutions outlining approaches to the project.

The purpose of prioritization is to make on-going strategic decisions whether a campus is expanding or contracting. To this end, prioritization allows for both near-term and long-range planning not just in response to fiscal constraints but also as a proactive tool for responsible stewardship of our valuable resources during times of growth. During the 2018-20 timeframe, the University anticipates reduced revenues and must adjust accordingly. The question has been how to do that wisely while preserving high-priority programs and reducing expenditures in other programs.

Based on SGGs' advice and the experience of earlier prioritization work, I asked Provost Beverly Edmond to chair a task force, and to start the process as soon as possible. In April and May, the campus community, through each of the SGGs, nominated task force participants. I appointed a broad-based 19-member APASP Task Force to design and conduct a campus-wide prioritization process.

Consultants provided guidance, but our own leaders designed a process that would be sensitive to our local context. The Task Force tenets and values have been:

- Loyalty to our identity as an internationally recognized flagship liberal arts university;
- Commitment to empowering students for success in higher education;
- Agility in our professional training to meet current and future labor market demands in Montana and beyond;

- Transparency at all levels of decision-making;
- Respect for a diverse student body and campus;
- Commitment to ensure UM remains a leader in academics, art, research, and innovation.

Approximately 30 University citizens participated on the Task Force, either as voting or *ex officio* members, at such an engaged level they may remember this as the most intensive service of their careers. They facilitated participation from hundreds more who served as writers, trainers, reviewers, and analysts. The comprehensive undertaking drew upon the creative and intellectual talents of our own employees.

Provost Edmond urged the SGGs to design and lead the process. She, with the help of excellent staff, provided guidance and logistical support, including developing a website for APASP to track and publicize its many component parts. Task Force subcommittees and their chairs led the way. The leaders in this effort were:

- Metrics/Data Subcommittee, Co-Chairs Christine Fiore and Andrew Ware
- APASP Framework Subcommittee, Co-Chairs John DeBoer and Chase Greenfield
- Criteria Subcommittee, Co-Chairs Steve Schwarze and Tom DeLuca

The Task Force decided to include all programs, academic and administrative. I supported this decision. This expanded FULL completion of the work beyond our eight-month timeline and posed a number of challenges for the Task Force. As Dean Tom DeLuca wrote in mid-July:

[Comments from public forums]...cautioned us to streamline the process and the total data volume used in assessing units and programs. In contrast, other comments recommended that additional metrics be added to ensure a fair and effective process... The Task Force is trying to find the perfect balance between being fair and thorough while reviewing over 500 [eventually 400] program and unit reports.

The Task Force focused first on programs supported by the University's current unrestricted funds (state contribution and tuition revenue). They asked all programs to submit reports, including those self-funded through auxiliary revenue (such as residence halls), designated revenue (such as athletics tickets sales) and restricted revenue (from grants or donors).

II. Recommendations for Next Steps in the APASP Process

The campus-wide effort to prioritize programs has represented a significant step forward in the University's efforts to engage in rational, strategic decision making. Predictably, our first attempt at institutional prioritization has been marked by imperfections and data limitations, a natural outcome of such an ambitious undertaking. Even so, just as our academic community commits to learning and improvement in our teaching, research, and service, our shared goal should also be to improve upon the APASP process of the past year. We must recognize what went right and what we must improve upon to measure success and allocate our human and

material resources. At the heart of our on-going APASP process is the need for us to address the issue of sustainability, i.e., the University's capacity to adequately provide the fiscal and human resources necessary for the number of programs (certificates, majors, minors, concentrations) and degrees we offer. This will require candid conversations about the sustainability of all academic and administrative programs.

In the near-term, our prioritization efforts will be useful for FY2019 and FY2020 planning. The University must make preliminary budget decisions this spring, based on a revenue forecast that will be lower than it was for FY2018. The fact that 85% to 90% of our general fund budget supports personnel, especially in our academic programs, means that our programs simply are not funded at a level which allows them to reach their maximum productivity or desired outcomes. While the APASP process identified areas for growth and development, we must resolve our structural deficit and determine the sustainability of existing academic programs. These efforts and near-term decisions should honor the thoughtful work and results of the Task Force and reflect the reality that academic affairs must reduce expenses.

Equally important, responsible longer term planning necessarily must include an institutionalized and improved APSAP process, including better use of data-informed academic planning and management. As we fine-tune the APASP process, our efforts should set the standard for future review and assessment of our programs and for responsible resource allocation that ensures sustainability across programs. In the next year, APASP can serve as a catalyst for innovation and consolidation. Just as crucially, it can better define outstanding areas of emphasis for the University's future. Many opportunities for innovation and savings are embedded in the reports and subsequent comments. The provost and deans should follow each thread, starting now, even as we contract our budget in the near future. An innovative and sustainable academic future for the University is possible. APASP reports have provided a springboard to emerge from a defensive posture and to move forward through innovative restructuring.

The following recommendations assume that an improved APASP process should characterize our planning culture into the future.

Recommendation 1: Complete the APASP work designated for Phase II, identifying additional programs for continued or diminished investment.

Recommendation 2: Charge the Task Force with submitting a recommendation to President Bodnar and Provost Edmond on options for developing an on-going prioritization process that aligns with and facilitates other institutional planning mechanisms. This recommendation should include plans for accomplishing the following:

- Develop a timeline for articulating action steps for recommendations, both in Phase I and beyond.

- Revise and update the APASP Task Force charge based on lessons learned in the first ten months of the process and reflective of the assumption that on-going strategic prioritization is critical for responsible stewardship of our resources.
- Develop a plan for communicating with and training administrators, faculty and staff during the implementation phase.
- Integrate the APASP process with the University’s planning, assessment and budget process. Connect any changes driven by APASP to the University’s continually updated strategic focus.
- Assign an APASP project manager to assist the provost and the Task Force, to shepherd the next phases, and to pursue worthy responses that emerged in Phase I, but that may have been overlooked or not integrated usefully into this or other documents.

III. Recommendations for Further Analysis, Potential Investment, and Broad Restructuring

The following recommendations represent broad areas for cross-sector, enterprise-level analysis, restructuring, and investments.

Recommendations for Further Analysis

Recommendation 3: Conduct a thorough review of Bitterroot College’s role in the University and its relationship with Missoula College. Perform this review with advice and counsel from the Montana University System and stakeholders. Set a deadline to accomplish this – i.e., April 15, 2018.

Recommendation 4: Evaluate the sustainability of all independently accredited programs, and specify needed resources to maintain their accreditation. The provost and deans, informed by APASP reports, should perform this evaluation.

Recommendation 5: Synthesize APASP lessons learned regarding data challenges, and develop a plan for improved integration of data in planning and decision-making. One of several challenges regarding data is reflected in an observation written by John DeBoer in an August APASP communication:

“There have been numerous questions regarding faculty who are given release time for administrative work such as chair/director/program head duties or advising... There is great disparity across campus for how such release time is allocated...”

Recommendation 6: Create a plan to improve efficiencies within the Mansfield Library. The dean of the Mansfield Library should work to capture efficiencies through internal reorganization and increased collaboration with Central IT and other campus units. While the Task Force placed two Library units in category 1, all Library units function as

part of an integrated whole. Therefore, any strategic investments made in the Library should be made with this broader integrated whole and these new efficiencies in mind.

Recommendations for Investment

Recommendation 7: Invest with high priority in support programs that demonstrably influence retention, persistence, and completion, e.g., the Office for Student Success, various advising initiatives, tutoring programs, and the Writing and Public Speaking Center. The latter is identified by APASP in category 1.

Recommendation 8: Invest in Graduate School stipends and waivers in robust degree programs to the extent possible; including recruitment of international students resources are available.

Recommendation 9: Invest in the biological, biomedical, and conservation sciences, areas of growth and strength within the university.

Recommendation 10: Invest in strong graduate programs. Graduate programs are a major area of strength for the University of Montana. APASP identified 13 graduate programs in category 1. In addition, many but not all of the 40 graduate programs in category 2 are stellar, unique to the state or region, and growing in both regular and online enrollment. The provost, the dean of the Graduate School, and Graduate Council should prioritize selected programs within these categories. This effort should focus on the potential to sustain or expand these programs while maintaining high standards and, in some cases, nationally recognized reputations.

Recommendations for Broad Restructuring

Recommendation 11: Consider restructuring possibilities for graduate programs to take advantage of interdisciplinary bridges. The deans and the dean of the Graduate School should consider recommendations from APASP and develop plans—which may include moratorium or discontinuation—regarding the sustainability and streamlining of several programs through interdisciplinary bridges, including the following:

- Ecosystems Management (This program is already, de facto, in moratorium. Consider its alliance with a larger online interdisciplinary structure.)
- Parks, Tourism and Recreational Management
- Interdisciplinary Graduate Program (This program needs additional support.)

Note: Board of Regents Policy 303.4 – Academic Program Moratorium and Termination is attached in Appendix C.

Recommendation 12: Develop coordinated staff support throughout academic affairs and administrative offices to minimize situations in which employees and services may be isolated and duplicative.

IV. Recommendations for Immediate Action

The following recommendations represent areas for immediate, imperative action. The recent APASP process afforded us insight into opportunities that, for various reasons, we cannot afford to ignore in the short term. These immediate opportunities should form the basis for Spring 2018 action. As our campus considers the broader relevance of APASP moving ahead, these immediate recommendations will also serve as direct evidence that the hard work of the Task Force and all those who participated in the process will not only influence future action but also provide an immediate blueprint for positive change.

Recommendation for Continued Support

Recommendation 13: Continue support for the UM Press, contingent upon changes proposed in the vice president's APASP response.

Recommendation for Further Analysis

Recommendation 14: Gather necessary information to plan for a sustained Women's Gender and Sexuality Studies program. Work with stakeholders, the dean, and the provost to specify the level of resources needed to sustain the program.

Recommendations for Investment

Recommendation 15: Invest in the Faculty Development Office.

Recommendation 16: Invest in professional development for all staff, and develop a specific plan and timeline for implementation.

Recommendation 17: Invest in the Global Engagement Office by building on current wide-ranging successes. Develop specific plans and timelines for increased collaboration among units with related responsibilities for global engagement and leadership.

Recommendation 18: Promote the honors programs to fulfill its potential for national distinction. The dean of the Davidson Honors College should propose opportunities for the University to invest in the honors program as not only a tool for student recruitment, retention, and success, but also as a laboratory for curricular innovation.

Recommendations for Restructuring

Recommendation 19: Restructure and optimize the Office of the Provost and Academic Affairs. The high stakes of this office cannot be overstated. The University depends on this office to provide high-functioning leadership on accreditation, academic array and aspirations, assessment of quality, faculty development, and direction and coordination

of colleges and schools and their deans. The office must also forge strong connections to the University's affiliate campuses and the Montana University System.

- Review and clarify the structure and expectations of the Office of the Provost with insight from the outgoing and incoming provosts.
- Relocate all centers and institutes currently within the Office of the Provost with the most appropriate University unit. This could allow for shared staff support and mission collaboration.
- Relocate primary administrative support for several entities that have strong connections to academic programs (e.g., the PEAS Farm, the George and Jane Dennison Theatre, the Wright Zoological Museum, the Montana Museum of Art and Culture, and the Blackfoot Café) to ensure efficiency and sufficient support.

Recommendation 20: Affiliate and relocate the Master of Public Administration and the nonprofit administration certificate and minor with the Baucus Policy Institute in the Alexander Blewett School of Law. Foster its successful online program. Ensure continued interdisciplinary connections with the School of Law and the College of Humanities and Sciences.

Recommendation 21: Merge the School of Art and the School of Media Arts within the College of Visual and Performing Arts (CVPA). Seek efficiency through stronger connections among the Broadcast Media Center, School of Journalism, and CVPA.

Recommendation 22: Decrease or restructure support for the O'Connor Center for the Rocky Mountain West in accordance with the donor's gift agreements, acknowledging contractual and, in fact, appreciative support for the Scott Senior Fellow Director position.

Recommendation 23: Consider restructuring opportunities in the following academic programs and areas. Deans should consider the APASP recommendations and develop plans—which may include moratorium or discontinuation—for the future of several programs and areas. These plans should seek opportunities for sustainability through consolidation, reduction, efficiency, and investment, and should identify potential interdisciplinary alliances.

A. Missoula College

The dean of Missoula College should consider recommendations from APASP and develop plans—which may include moratorium or discontinuation—for the future of several programs in the college through credit-requirement review and student and industry input. Many of these programs provide useful workforce tools for students and industry, but outcomes may be achieved with less time for students and more support from industry. In addition, the dean should work with Mountain and River Campus stakeholders to support co-requisite models for mathematics and writing, and to enable reduced time to completion for students. Programs to review:

- The Energy Technology program
- The Computer Aided Design 30-credit program (For example, can it be accomplished with fewer credits, perhaps a certificate program?)
- Three related certificate programs: Computer Support, Cyber Security and Health Information Technology
- Food Service Management two-year degree program (currently a separate program from Culinary Arts)
- Paralegal Studies as a two-year degree program (Reconsider the legal technology component and continue building bridges and sharing resources between the law school and the two-year program.)
- Medical Reception as a certificate program
- Surgical Technology
- Pharmacy Tech
- Entrepreneurship certificate
- Sales and Marketing certificate
- Electronics technology two-year degree program
- Recreational Power Equipment certificate

Please see Appendix B for a letter from the Missoula College Faculty Association about the overall mission of the College and its programs. For the reasons cited therein, further analysis of Missoula College programs and mission should be a priority for the faculty, the dean, and the provost.

B. Undergraduate Programs

The deans should consider recommendations from APASP and develop plans—which may include moratorium or discontinuation—for the following undergraduate programs, focusing specifically on their academic homes, their sustainability, and their interdisciplinary allies:

- Applied Science major
- Film Studies minor
- Duplicate history and political science minors
- Bioethics certificate
- Health Enhancement concentration
- Administrative Systems Management minor
- Library Media minor

C. Broad Restructuring of Academic Areas

The deans should consider recommendations from APASP and develop plans—which may include moratorium or discontinuation—for the future of the following areas. The following list is not comprehensive but represents important opportunities for strength, consolidation, reduction, efficiency and investment and, in some cases, all of the above. The deans must work together to identify silo “markers” dividing departments and colleges, with

recommendations for cross-college and intra-departmental changes. This section includes one underlying imperative: we must reduce costs through more strategic deployment of current faculty.

C.1 World Languages and Culture

Seize the opportunity to create a comprehensive division of World Languages and Culture, as suggested by the dean of the College of Humanities and Sciences. Components of a new division could include disciplines (not necessarily programs) such as, although not limited to, the Classics, Russian, German, French, Spanish, Latin American Studies, Irish Studies, Chinese, Japanese, Arabic, East Asian Studies, Central and Southwest Asian Studies, and South and Southeast Asian Studies. Efforts should include even stronger ties to the Maureen and Mike Mansfield Center and Global Engagement Office.

C.2 Mathematical and Physical Sciences

Consider the opportunity to create cross-disciplinary linkages that more intentionally connect applied math, statistical and computer sciences, economics, business analytics, cyber security and “big data,” to name a few. The University should support initiatives such as the co-requisite model within mathematics, a proven student success strategy.

C.3 Environment and Ecology

Create even more cross-disciplinary connections throughout the environment and ecology programs (e.g., consider interdisciplinary opportunities for graduate programs in forestry and conservation, English, journalism, social sciences, biological sciences, Native American Studies, and Missoula College). For example, the Ecosystem Science and Restoration program could have been placed into category 1 for stable or increased investment, possibly sharing faculty with other worthy programs. The goal is to increase enrollment by efficiently and effectively meeting student demand while potentially employing fewer numbers of faculty.

C.4 Global Leadership

Explore the potential of existing interdisciplinary and experiential learning programs that promote leadership. The dean of the Davidson Honors College, the director of the Mansfield Center, and the director of the Franke Global Leadership Initiative should explore opportunities for integration between their interdisciplinary and experiential learning programs and for capturing administrative, recruiting and programmatic efficiencies.

C.5 Public Health

Recognize and capitalize on the frequent intersections of public health, political science, education, behavioral sciences, social work, counseling, psychology, communication studies, and health and human performance. APASP has

provided us, as a side benefit, the mandate to construct aggressive innovative programs in a rapidly changing field with worldwide demand.

C.6 Education

Recognize the need for closer connections among areas that help to prepare our future educators. America's schools need our graduates. In spite of polls and ideologies that suggest the contrary, democracy and public well-being depend on universities to educate wise, well rounded, compassionate teachers. As they already are doing, our education professors should make even stronger common cause with excellent undergraduate programs such as political science, history, psychology, business, marketing, and environmental studies to inspire more college graduates to consider careers as teachers.

V. Non-Academic Affairs Sector Recommendations

The following recommendations are specific to non-academic sectors and impact areas that provide services across the institution.

Recommendations for the Office of Administration and Finance

Recommendation for Continued Effort

Recommendation 24: Update and publicize campus safety and security plans and guidelines.

Recommendations for Investment

Recommendation 25: Invest in data infrastructure. The Data Office has acknowledged challenges in generating consistent data. They invite everyone to visit the APASP Data Validation webpage to review their reports and recommend ideas for consistent, comparable and actionable data. Consistent, strong, clear, and trustworthy data are critical not only for the APASP process but also for uses across the decision-making and assessment responsibilities of the institution.

Recommendation 26: Elevate deferred maintenance as a priority investment.

Recommendation 27: Invest in a maintenance management system to prioritize risk mitigation, response time, and state data requests. The homegrown software now in use is antiquated.

Recommendation 28: Invest in human resources business solutions software.

Recommendations for Restructuring and Collaboration

Recommendation 29: Maximize expertise and efficiency by moving ADA accommodation functions, currently in Human Resource Services (HRS), to the Office of Disability Services for Students. Ensure close connections and collaboration between those offices and the University Americans with Disabilities Act (ADA) Team and the student group ADSUM (Alliance for Disability and Students at UM).

Recommendation 30: Consolidate management of surplus property under recycling.

Recommendation 31: Strengthen collaboration in specific, accountable ways among the Adams Center, Grizzly Athletics, UM Productions, the School of Theatre & Dance, the School of Music, and the College of Business Entertainment Management program.

Recommendation 32: Explore the relationship between ASUM's exemplary transportation program and the University's parking services, for purposes of increasing cost-savings and service.

Recommendations for the Office of Enrollment Management and Student Affairs

Recommendation 33: Invest in the Admissions Office for marketing, mailings, social media, new markets, long-standing markets, and travel for a highly effective level of outreach. Require that the office justify with specificity to the president ways it currently allocates its budget and how it proposes to use increased investments going forward.

Recommendation 34: Require that Enrollment Management continue to provide a data-informed analysis of the results from each category of fee waivers. APASP reviews reflect uncertainty about the efficacy of some fee waivers.

Recommendation 35: Recognize the several offices within Student Affairs that are performing admirably, with examples such as the VETS Office, American Indian Student Services, Career Services and Disability Services for Students. The latter is identified by APASP in category 1. These general-fund services and others as well, deserve commendation.

Recommendations for the President's Office and Sector

The President's Office includes a small staff of individuals who assist the president in overseeing the mission of the University. The other sectors of the president's domain include:

- Campus Compact
- Diversity Advisory Council
- Americans with Disabilities Act (ADA Team)
- Equal Opportunity and Affirmative Action
- Information Technology
- Integrated Communications, University Relations, and Alumni Relations
- Intercollegiate Athletics
- Internal Audit
- Legal Counsel

Recommendations for Further Analysis and Possible Restructuring

Recommendation 36: Ensure that the new president has sufficient staff and resources to succeed on behalf of the University. APASP placed the President's Office in category 2. The president has a modest staff of 3.5 individuals, reduced in recent years, to assist the president in overseeing the mission of the University.

Recommendation 37: Determine the viability of Printing and Graphics Services, with the goal of honoring employees, their longtime service, the needs of the campus, the utilization of Campus Quick Copy, and the deficit in Printing and Graphics Services.

Recommendation 38: Accept a definition of Information Technology (IT) as a critical campus-wide service and utility, as well as an enabler for initiatives in the University's *Strategic Vision*. IT should proceed to implement the OneIT plan under the guidance of President Bodnar, and should consider possible restructuring.

- IT should continue to refine and operationalize, as directed by President Bodnar, the OneIT plan its leaders and stakeholders developed over the course of the past 10 months, in concert with end users such as faculty, students, staff, and all programs.
- The location for IT services is less than ideal. Consolidation and change should be explored for the sake of making best use of staff.

Recommendation 39: Ensure that Intercollegiate Athletics (ICA) continues to meet the compliance standards of Division I NCAA membership as determined by the Montana Board of Regents. Private fundraising for scholarships and

facilities, plus event attendance, continue to be primary sources of funds for ICA. General fund and student fees revenues are smaller by percentage than for comparable schools but annually should be evaluated for sustainability.

Recommendations for Investment

Recommendation 40: Evaluate the University's communications sector, including marketing, University Relations, and Alumni Relations, as well as the sector's collaboration with admissions and enrollment management. Heed the recommendations that come out of President Bodnar and consultants' review of this area, which is a fruitful area for investment, restructuring, and renewed emphasis.

Recommendation 41: Invest in offices such as Equal Opportunity and Affirmative Action, Internal Audit, and Legal Counsel, which are indispensable for compliance, risk reduction, and proactive service to the campus and its affiliates. All were on the cusp for investment in APASP category 1 and should continue as high priorities within the University.

VI. Concluding Thoughts and What's Next?

In the short-term, the University will use the information from APASP to inform decisions in the forthcoming budget cycle. Deans and directors must recommend to vice presidents specific avenues for savings.

President Bodnar will need time to review APASP Phase I, determine what is most useful from his perspective, and revise the timeline for implementation plans accordingly. President Bodnar of course may revise the process into phases or in many other ways, based on his consideration and consultation with campus leaders, and according to the priorities of his early months as our new president.

However, the University must make preliminary budget decisions in the spring based on a revenue forecast that will be lower than it was for FY2018. Cabinet will review assumptions about the University's revenue for FY2019 early in spring semester of 2018, after consultation with the Office of the Commissioner of Higher Education. Even with all the positive information contained in APASP reports, we must forego expansion in some of our programs to operate within our budget for the 2018-2020 timeframe. APASP results will help inform specific decisions so that those decisions are strategic rather than "across the board."

Recently the Chair of Faculty Senate reminded Cabinet about the people behind the numbers. She cautioned that we must strive to understand and assist those who worry about their future with the University. I appreciate and commend her advice.

As we look beyond the University's immediate future to make strategic long-range decisions, the conclusions and data from APASP will serve as a significant resource for deans, directors, and vice presidents in making proposing balanced budgets by sector.

APASP has highlighted many areas poised for growth and investment, as mentioned in many recommendations. Some investments using general funds will have to be held in abeyance, except as priorities for private fundraising (determined by the president).

In conclusion, I would personally like to thank everyone who helped launch the University's ambitious and in-depth prioritization process. While the process had well-documented limitations, it has moved us forward toward improving our collective understanding of hundreds of programs. As we develop an improved APASP process grounded in reliable data, we can make better—and difficult—decisions. The University's collective task going forward should be to set priorities continuously through an improved process of trusted shared governance, whether it is through APASP or revised versions thereof. President Seth Bodnar, Commissioner Clayton Christian, and the Montana Board of Regents will depend on University of Montana leaders to improve upon and advance prioritization work through shared governance, to work together to change course strategically, and to design our future wisely.