

The University of Montana



2010 SELF-STUDY

APPENDIX

The University of Montana

2010 Self-Study

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The University of Montana
Student FTE Enrollment Analysis, FY 2004-FY 2010

| | <u>Actual</u> FY 2004 | <u>Actual</u> FY2005 | <u>Actual</u> FY 2006 | <u>Actual</u> FY 2007 | <u>Actual</u> FY 2008 | <u>Actual</u> FY 2009 | <u>Budgeted</u> FY 2010 |
|--|--------------------------|-------------------------|--------------------------|--------------------------|--------------------------|--------------------------|----------------------------|
| Missoula | | | | | | | |
| College of Technology | | | | | | | |
| Resident | 855.27 | 873.44 | 966.97 | 1,032.97 | 1,162.50 | 1,278.66 | 1,344.10 |
| Resident Distance | - | - | - | - | 23.44 | 34.13 | 20.90 |
| WUE | 6.23 | 2.03 | 4.50 | 7.53 | 13.30 | 9.85 | 8.00 |
| Nonresident | 34.07 | 41.23 | 47.94 | 57.31 | 75.20 | 95.08 | 105.00 |
| Nonresident Distance | - | - | - | - | 1.53 | 5.31 | 1.00 |
| Total | 895.57 | 916.70 | 1,019.41 | 1,097.81 | 1,275.97 | 1,423.03 | 1,479.00 |
| Lower Division | | | | | | | |
| Resident | 4,695.57 | 4,496.54 | 4,451.83 | 4,444.57 | 4,418.00 | 4,551.00 | 4,299.40 |
| Resident Distance | - | - | - | - | 4.50 | 24.20 | 10.60 |
| WUE | 327.50 | 359.34 | 413.66 | 395.63 | 444.27 | 377.52 | 450.00 |
| Nonresident | 1,239.20 | 1,224.67 | 1,249.14 | 1,264.14 | 1,225.37 | 1,300.76 | 1,432.60 |
| Nonresident Distance | - | - | - | - | 0.69 | 8.00 | 2.40 |
| Total | 6,262.27 | 6,080.54 | 6,114.63 | 6,104.34 | 6,092.83 | 6,261.48 | 6,195.00 |
| Upper Division | | | | | | | |
| Resident | 2,368.73 | 2,470.40 | 2,357.23 | 2,401.89 | 2,458.64 | 2,530.50 | 2,329.69 |
| Resident Distance | - | - | - | - | 1.86 | 6.80 | 5.30 |
| WUE | 145.53 | 147.75 | 172.54 | 241.44 | 253.07 | 253.18 | 280.00 |
| Nonresident | 653.30 | 654.77 | 639.57 | 603.40 | 593.47 | 583.76 | 599.67 |
| Nonresident Distance | - | - | - | - | 1.33 | 2.14 | 4.34 |
| Total | 3,167.56 | 3,272.92 | 3,169.34 | 3,246.73 | 3,308.37 | 3,376.38 | 3,219.00 |
| Subtotal Undergraduate (excluding COT) | | | | | | | |
| Resident | 7,064.30 | 6,966.94 | 6,809.06 | 6,846.46 | 6,876.64 | 7,081.50 | 6,629.09 |
| Resident Distance | - | - | - | - | 6.36 | 31.00 | 15.90 |
| WUE | 473.03 | 507.08 | 586.20 | 637.07 | 697.34 | 630.70 | 730.00 |
| Nonresident | 1,892.50 | 1,879.44 | 1,888.71 | 1,867.54 | 1,818.84 | 1,884.52 | 2,032.27 |
| Nonresident Distance | - | - | - | - | 2.02 | 10.14 | 6.74 |
| Total | 9,429.83 | 9,353.46 | 9,283.97 | 9,351.07 | 9,401.20 | 9,637.86 | 9,414.00 |

The University of Montana
Student FTE Enrollment Analysis, FY 2004-FY 2010

| | <u>Actual</u> FY 2004 | <u>Actual</u> FY2005 | <u>Actual</u> FY 2006 | <u>Actual</u> FY 2007 | <u>Actual</u> FY 2008 | <u>Actual</u> FY 2009 | <u>Budgeted</u> FY 2010 |
|--------------------------|--------------------------|-------------------------|--------------------------|--------------------------|--------------------------|--------------------------|----------------------------|
| Graduate I | | | | | | | |
| Resident | 837.50 | 805.92 | 819.92 | 809.33 | 835.76 | 839.87 | 884.50 |
| Resident Distance | | | | | 10.00 | 29.67 | 9.50 |
| Nonresident | 334.67 | 338.63 | 337.96 | 343.13 | 350.67 | 322.31 | 368.00 |
| Nonresident Distance | - | - | - | - | 3.50 | 3.71 | 4.00 |
| Total | <u>1,172.17</u> | <u>1,144.55</u> | <u>1,157.88</u> | <u>1,152.46</u> | <u>1,199.93</u> | <u>1,195.56</u> | <u>1,266.00</u> |
| Graduate II | | | | | | | |
| Resident | 289.50 | 309.21 | 303.97 | 330.94 | 361.42 | 344.72 | 362.75 |
| Resident Distance | | | | | 0.87 | 1.25 | 0.25 |
| Nonresident | 226.87 | 224.67 | 217.38 | 207.74 | 195.58 | 181.00 | 193.00 |
| Nonresident Distance | - | - | - | - | - | 0.13 | - |
| Total | <u>516.37</u> | <u>533.88</u> | <u>521.35</u> | <u>538.68</u> | <u>557.87</u> | <u>527.10</u> | <u>556.00</u> |
| Subtotal Graduate | | | | | | | |
| Resident | 1,127.00 | 1,115.13 | 1,123.89 | 1,140.27 | 1,197.18 | 1,184.59 | 1,247.25 |
| Resident Distance | - | - | - | - | 10.87 | 30.92 | 9.75 |
| Nonresident | 561.54 | 563.29 | 555.34 | 550.87 | 546.25 | 503.31 | 561.00 |
| Nonresident Distance | - | - | - | - | 3.50 | 3.84 | 4.00 |
| Total | <u>1,688.54</u> | <u>1,678.42</u> | <u>1,679.23</u> | <u>1,691.14</u> | <u>1,757.80</u> | <u>1,722.66</u> | <u>1,822.00</u> |
| Total | | | | | | | |
| Resident | 9,046.57 | 8,955.50 | 8,899.92 | 9,019.70 | 9,236.32 | 9,544.75 | 9,220.44 |
| Resident Distance | - | - | - | - | 40.67 | 96.05 | 46.55 |
| WUE | 479.26 | 509.11 | 590.70 | 644.60 | 710.64 | 640.55 | 738.00 |
| Nonresident | 2,488.11 | 2,483.96 | 2,491.99 | 2,475.72 | 2,440.29 | 2,482.91 | 2,698.27 |
| Nonresident Distance | - | - | - | - | 7.05 | 19.29 | 11.74 |
| Total | <u>12,013.94</u> | <u>11,948.57</u> | <u>11,982.61</u> | <u>12,140.02</u> | <u>12,434.97</u> | <u>12,783.55</u> | <u>12,715.00</u> |

The University of Montana
Retention and Graduation Rates, Fall 1991 to Fall 2007

Institution-wide Rates for All First-time, Full-time, Bachelor-degree-seeking Freshmen

| Fall | Headcount | Average ACT | Average SAT | Retention Rate | | Cumulative Graduation/Continuation Rates | | | | | | | |
|------|-----------|-------------|-------------|----------------|---------------|--|-------|----------------|-------|----------------|------|-----------------|------|
| | | | | After 1 Year | After 2 Years | Within 4 Years | | Within 5 Years | | Within 6 Years | | Within 10 Years | |
| | | | | | | Grad | Cont | Grad | Cont | Grad | Cont | Grad | Cont |
| 1991 | 1,303 | 22.1 | 1049 | 70.5% | 55.3% | 10.1% | 35.5% | 30.2% | 14.7% | 36.8% | 8.2% | 42.3% | 1.8% |
| 1992 | 1,393 | 22.6 | 1053 | 67.7% | 52.7% | 10.0% | 34.1% | 29.1% | 12.7% | 36.3% | 6.2% | 42.6% | 1.5% |
| 1993 | 1,423 | 22.5 | 1058 | 66.2% | 52.1% | 13.3% | 32.1% | 32.0% | 11.7% | 38.1% | 6.3% | 44.6% | 1.2% |
| 1994 | 1,512 | 22.5 | 1057 | 63.0% | 53.6% | 16.6% | 29.9% | 34.1% | 9.7% | 39.9% | 4.6% | 45.0% | 0.9% |
| 1995 | 1,452 | 22.8 | 1078 | 64.8% | 51.9% | 17.9% | 27.7% | 33.8% | 11.0% | 40.3% | 5.6% | 45.2% | 0.7% |
| 1996 | 1,618 | 22.3 | 1069 | 70.5% | 55.8% | 20.0% | 28.7% | 37.3% | 11.8% | 43.3% | 5.7% | 48.2% | 1.4% |
| 1997 | 1,711 | 22.7 | 1083 | 71.1% | 57.0% | 19.6% | 33.0% | 38.3% | 11.7% | 45.0% | 5.4% | 50.7% | 1.0% |
| 1998 | 1,604 | 22.7 | 1077 | 70.2% | 57.2% | 19.3% | 32.4% | 37.5% | 13.0% | 44.0% | 6.5% | 49.3% | 1.1% |
| 1999 | 1,671 | 22.6 | 1087 | 68.3% | 54.8% | 20.3% | 30.8% | 36.8% | 10.8% | 44.0% | 4.8% | | |
| 2000 | 1,750 | 22.3 | 1062 | 69.7% | 57.8% | 19.7% | 28.9% | 36.2% | 11.8% | 42.3% | 5.9% | | |
| 2001 | 1,764 | 22.4 | 1068 | 69.4% | 57.4% | 19.5% | 31.3% | 36.5% | 12.2% | 43.2% | 6.3% | | |
| 2002 | 1,788 | 22.1 | 1072 | 71.3% | 58.0% | 18.5% | 31.3% | 35.7% | 12.6% | 41.9% | 6.0% | | |
| 2003 | 1,770 | 22.5 | 1079 | 69.5% | 57.7% | 19.4% | 33.4% | 36.9% | 13.6% | | | | |
| 2004 | 1,808 | 22.4 | 1075 | 69.8% | 56.8% | 19.4% | 30.6% | | | | | | |
| 2005 | 1,770 | 22.9 | 1093 | 72.1% | 60.4% | | | | | | | | |
| 2006 | 1,658 | 22.9 | 1080 | 71.7% | 61.8% | | | | | | | | |
| 2007 | 1,662 | 22.9 | 1069 | 71.5% | | | | | | | | | |
| 2008 | 1,856 | 23.0 | 1076 | | | | | | | | | | |

| | | | | | | | | | | | | | |
|------|-------|------|-------|-------|-------|-------|-------|-------|-------|-------|------|-------|------|
| Avg. | 1,640 | 22.6 | 1,071 | 69.2% | 56.3% | 17.4% | 31.4% | 35.0% | 12.1% | 41.3% | 6.0% | 46.0% | 1.2% |
|------|-------|------|-------|-------|-------|-------|-------|-------|-------|-------|------|-------|------|

NOTES: As reported to the Consortium for Student Retention Data Exchange (CSRDE), Center for Institutional Data Exchange and Analysis, University of Oklahoma.

Cohorts consist of first-time full-time bachelor-degree-seeking students (freshmen) with no college experience. Includes students enrolled in the fall term who attended for the first time in the prior summer term.

The University of Montana
Undergraduate Attrition, Fall 2007 to Fall 2008

| Totals | Traditional Degree-Seeking | | | | Non-Traditional | Nondegree-Seeking | Post-Baccalaureate | Total |
|--|----------------------------|--------------|-------|----------|-----------------|-------------------|--------------------|----------|
| | Residents | Nonresidents | WUE | Subtotal | | | | |
| Total Undergrads Enrolled Fall 07 | 6,591 | 1,829 | 695 | 9,115 | 574 | 185 | 393 | 10,267 |
| Plus: New Freshman - Fall 08 | 1,236 | 519 | 113 | 1,868 | 139 | 0 | 0 | 2,007 |
| Plus: New Transfers - Fall 08 | 461 | 208 | 20 | 689 | 4 | 107 | 80 | 880 |
| Plus: Re-enrolling Students - Fall 08 | 803 | 135 | 13 | 951 | 105 | 10 | 129 | 1,195 |
| Residency\Level Changes | 46 | (60) | (20) | (34) | 4 | (17) | 71 | 0 |
| Less: Graduations-Fall 07 thru Summer 08 | (1,050) | (271) | (126) | (1,447) | (63) | 0 | (40) | (1,550) |
| Plus: Persisting Degreed Undergraduates | 4 | 0 | 0 | 4 | 0 | 0 | 59 | 63 |
| Less: Total Enrolled Fall 08 | (6,771) | (1,939) | (619) | (9,329) | (592) | (139) | (495) | (10,555) |
| Attrition Fall 08 | 1,320 | 421 | 76 | 1,817 | 171 | 122 | 197 | 2,307 |
| Percent Attrition | 20.0% | 23.0% | 10.9% | 19.9% | 29.8% | 65.9% | 50.1% | 22.5% |
| | | | | | | | | |
| Lower Division | Traditional Degree-Seeking | | | | Non-Traditional | Nondegree-Seeking | Post-Baccalaureate | Total |
| | Residents | Nonresidents | WUE | Subtotal | | | | |
| Lower Undergrads Enrolled Fall 07 | 3,168 | 1,015 | 359 | 4,542 | 359 | 185 | | 5,086 |
| Plus: New Freshman - Fall 08 | 1,236 | 519 | 113 | 1,868 | 139 | 0 | | 2,007 |
| Plus: New Transfers - Fall 08 | 290 | 119 | 8 | 417 | 1 | 107 | | 525 |
| Plus: Re-enrolling Students - Fall 08 | 369 | 69 | 2 | 440 | 81 | 10 | | 531 |
| Residency/Level Changes | 43 | (14) | (6) | 23 | 6 | (29) | | 0 |
| Less: Graduations-Fall 07 thru Summer 08 | 0 | 0 | 0 | 0 | 0 | 0 | | 0 |
| Plus: Persisting Degreed Undergraduates | | | | 0 | | | | 0 |
| Less: Progression From Lower to Upper | (986) | (296) | (142) | (1,424) | (70) | (12) | 0 | (1,506) |
| Less: Lower Enrolled Fall 08 | (3,278) | (1,131) | (280) | (4,689) | (382) | (139) | | (5,210) |
| Attrition Fall 08 | 842 | 281 | 54 | 1,177 | 134 | 122 | 0 | 1,433 |
| Percent Attrition | 26.6% | 27.7% | 15.0% | 25.9% | 37.3% | 65.9% | | 28.2% |

The University of Montana
Undergraduate Attrition, Fall 2007 to Fall 2008

Upper Division

| | Traditional Degree-Seeking | | | | Non-Traditional | Nondegree-Seeking | Post-Baccalaureate | Total |
|--|----------------------------|--------------|-------|----------|-----------------|-------------------|--------------------|---------|
| | Residents | Nonresidents | WUE | Subtotal | | | | |
| Upper Undergrads Enrolled Fall 07 | 3,423 | 814 | 336 | 4,573 | 215 | | 393 | 5,181 |
| Plus: Progression From Lower to Upper | 1,011 | 285 | 138 | 1,434 | 70 | | 2 | 1,506 |
| Plus: New Freshman - Fall 08 | | | | 0 | | | | 0 |
| Plus: New Transfers - Fall 08 | 171 | 89 | 12 | 272 | 3 | | 80 | 355 |
| Plus: Re-enrolling Students - Fall 08 | 434 | 66 | 11 | 511 | 24 | | 129 | 664 |
| Residency/Level Changes | (22) | (35) | (10) | (67) | (2) | | 69 | 0 |
| Less: Graduations-Fall 07 thru Summer 08 | (1,050) | (271) | (126) | (1,447) | (63) | | (40) | (1,550) |
| Plus: Persisting Degreed Undergraduates | 4 | | | 4 | | | 59 | 63 |
| Less: Upper Enrolled Fall 08 | (3,493) | (808) | (339) | (4,640) | (210) | | (495) | (5,345) |
| Attrition Fall 08 | 478 | 140 | 22 | 640 | 37 | 0 | 197 | 874 |
| Percent Attrition | 14.0% | 17.2% | 6.5% | 14.0% | 17.2% | | 50.1% | 16.9% |

| Calculated Totals | Traditional Degree-Seeking | | | | Non-Traditional | Nondegree-Seeking | Post-Baccalaureate | Total |
|--|----------------------------|--------------|-------|----------|-----------------|-------------------|--------------------|----------|
| | Residents | Nonresidents | WUE | Subtotal | | | | |
| Total Undergrads Enrolled Fall 07 | 6,591 | 1,829 | 695 | 9,115 | 574 | 185 | 393 | 10,267 |
| Plus: New Freshman - Fall 08 | 1,236 | 519 | 113 | 1,868 | 139 | 0 | 0 | 2,007 |
| Plus: New Transfers - Fall 08 | 461 | 208 | 20 | 689 | 4 | 107 | 80 | 880 |
| Plus: Re-enrolling Students - Fall 08 | 803 | 135 | 13 | 951 | 105 | 10 | 129 | 1,195 |
| Residency/Level Changes | 21 | (49) | (16) | (44) | 4 | (29) | 69 | 0 |
| Progression Lower to Upper Differences | 25 | (11) | (4) | 10 | 0 | (12) | 2 | 0 |
| Less: Graduations-Fall 07 thru Summer 08 | (1,050) | (271) | (126) | (1,447) | (63) | 0 | (40) | (1,550) |
| Plus: Persisting Degreed Undergraduates | 4 | 0 | 0 | 4 | 0 | 0 | 59 | 63 |
| Less: Total Enrolled Fall 08 | (6,771) | (1,939) | (619) | (9,329) | (592) | (139) | (495) | (10,555) |
| Attrition Fall 08 | 1,320 | 421 | 76 | 1,817 | 171 | 122 | 197 | 2,307 |
| Percent Attrition | 20.0% | 23.0% | 10.9% | 19.9% | 29.8% | 65.9% | 50.1% | 22.5% |
| Attrition Fall 08 - Query | 1,320 | 421 | 76 | 1,817 | 171 | 122 | 197 | 2,307 |
| Balance | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

The University of Montana
Standard 3: Students - Table 1 - Admissions Report

| | Fall 2006 | Fall 2007 | Fall 2008 | Fall 2009 |
|--|-----------|-----------|-----------|-----------|
| First-time Freshmen Applications Received | | | | |
| Applied | 4,841 | 4,756 | 5,324 | 5,471 |
| Admitted | 4,644 | 4,532 | 5,101 | 5,193 |
| Denied* | 197 | 224 | 223 | 278 |
| Enrolled | 2,139 | 2,199 | 2,479 | 2,369 |
| Transfer Applications Received | | | | |
| Applied | 1,973 | 1,772 | 1,814 | 1,966 |
| Admitted | 1,729 | 1,568 | 1,607 | 1,713 |
| Denied* | 244 | 204 | 207 | 253 |
| Enrolled | 911 | 833 | 915 | 979 |
| Readmission Applications Received | | | | |
| Applied | 254 | 289 | 290 | 358 |
| Admitted | 242 | 274 | 267 | 327 |
| Denied* | 12 | 15 | 23 | 31 |
| Enrolled | 146 | 175 | 170 | 204 |
| Graduate Applications Received | | | | |
| Applied | 1,666 | 1,761 | 1,658 | 1,810 |
| Admitted | 745 | 746 | 709 | 876 |
| Denied* | 921 | 1,015 | 949 | 934 |
| Enrolled | 428 | 416 | 394 | 500 |
| Professional Applications Received | | | | |
| Applied | 597 | 653 | 630 | 601 |
| Admitted | 222 | 255 | 245 | 242 |
| Denied* | 375 | 398 | 385 | 359 |
| Enrolled | 115 | 116 | 119 | 116 |
| Nondegree Applications Received | | | | |
| Applied | 446 | 341 | 320 | 319 |
| Admitted | 435 | 336 | 310 | 309 |
| Denied* | 11 | 5 | 10 | 10 |
| Enrolled | 259 | 206 | 190 | 195 |

* Denials are not recorded in the MUS Student Datawarehouse. This figure is derived, calculated as the difference between the number of applied and admitted students.

** Professional practice doctoral applicants, formerly first-professional.

The University of Montana
Standard 3: Students - Table 2 - Student Affairs Staff Profile

| | | Professional | Support | Student | Other |
|----------------------------|----------------------------|--------------|---------|---------|-------|
| Gender: | Female | 72 | 142 | 455 | 12 |
| | Male | 37 | 88 | 316 | 9 |
| Degrees: | PhD, EdD | 7 | 0 | 1 | 1 |
| | MD, JD, MSW | 17 | 1 | 0 | 0 |
| | MA, MS | 23 | 9 | 10 | 2 |
| | BA, BS | 52 | 66 | 14 | 3 |
| | AA, AAS, Certificate, etc. | 10 | 53 | 15 | 6 |
| Years Experience in Field: | none | 1 | 1 | 20 | 0 |
| | less than 5 | 12 | 50 | 667 | 11 |
| | 5 - 10 | 24 | 68 | 20 | 8 |
| | 11 - 15 | 12 | 43 | 0 | 3 |
| | 16 - 20 | 13 | 22 | 0 | 0 |
| | more than 20 | 47 | 46 | 0 | 0 |
| Full-time: | 9/10 months | 11 | 26 | 0 | 0 |
| | 12 months | 69 | 181 | 0 | 0 |
| Part-time: | 9/10 months | 15 | 12 | 587 | 0 |
| | 12 months | 14 | 11 | 184 | 22 |

**The University of Montana
Faculty Counts, Academic Year 2008-09**

| | <u>Headcount</u> | | | | | | <u>Percentage of Total</u> | | | | | |
|--|--|-----------|--------------|---|-----------|--------------|----------------------------|-----------|--------------|-------------|-----------|--------------|
| | Instructional Faculty (Instructional FTE > 0.00) | | | All Faculty (Instructional and Other) | | | Instructional Faculty | | | All Faculty | | |
| | <u>FT</u> | <u>PT</u> | <u>Total</u> | <u>FT</u> | <u>PT</u> | <u>Total</u> | <u>FT</u> | <u>PT</u> | <u>Total</u> | <u>FT</u> | <u>PT</u> | <u>Total</u> |
| <u>Total faculty</u> | 519 | 165 | 684 | 548 | 200 | 748 | 100% | 100% | 100% | 100% | 100% | 100% |
| Nonresident alien (international) | 25 | 12 | 37 | 28 | 14 | 42 | 5% | 7% | 5% | 5% | 7% | 6% |
| Minorities | 67 | 17 | 84 | 70 | 21 | 91 | 13% | 10% | 12% | 13% | 11% | 12% |
| Women | 189 | 79 | 268 | 197 | 95 | 292 | 36% | 48% | 39% | 36% | 48% | 39% |
| Men | 330 | 86 | 416 | 351 | 105 | 456 | 64% | 52% | 61% | 64% | 53% | 61% |
| <u>Tenure status</u> | 519 | 165 | 684 | 548 | 200 | 748 | 100% | 100% | 100% | 100% | 100% | 100% |
| Tenured (CT) | 309 | 11 | 320 | 311 | 12 | 323 | 60% | 7% | 47% | 57% | 6% | 43% |
| Tenure track (PT) | 151 | 6 | 157 | 152 | 7 | 159 | 29% | 4% | 23% | 28% | 4% | 21% |
| Nontenurable (NT) | 59 | 148 | 207 | 85 | 181 | 266 | 11% | 90% | 30% | 16% | 91% | 36% |
| <u>Rank</u> | 519 | 165 | 684 | 548 | 200 | 748 | | | | | | |
| Professor | 221 | 16 | 237 | 226 | 25 | 251 | 39% | 7% | 30% | 38% | 9% | 29% |
| Associate Professor | 128 | 10 | 138 | 134 | 16 | 150 | 23% | 4% | 17% | 23% | 6% | 17% |
| Assistant Professor | 135 | 49 | 184 | 151 | 61 | 212 | 24% | 21% | 23% | 25% | 23% | 25% |
| Instructor | 19 | 82 | 101 | 20 | 90 | 110 | 3% | 35% | 13% | 3% | 33% | 13% |
| Lecturer | 16 | 8 | 24 | 17 | 8 | 25 | 3% | 3% | 3% | 3% | 3% | 3% |
| <u>Total full-time equivalent (FTE)</u> | 519 | 61 | 580 | 548 | 74 | 622 | 89% | 11% | 100% | 88% | 12% | 100% |
| <u>Have doctorate, FP, or other terminal degree</u> | 455 | 73 | 528 | 481 | 95 | 576 | 88% | 44% | 77% | 88% | 48% | 77% |
| Highest degree is Doctorate (PhD, EdD) | 384 | 43 | 427 | 407 | 63 | 470 | 74% | 26% | 62% | 74% | 32% | 63% |
| Highest degree is Juris Doctor (FP degree) | 23 | 12 | 35 | 24 | 12 | 36 | 4% | 7% | 5% | 4% | 6% | 5% |
| Highest degree is PharmD (FP degree) | 9 | 1 | 10 | 9 | 1 | 10 | 2% | 1% | 1% | 2% | 1% | 1% |
| Terminal master's or other terminal degree | 39 | 17 | 56 | 41 | 19 | 60 | 8% | 10% | 8% | 7% | 10% | 8% |
| <u>Have other than a terminal degree (nonterminal)</u> | 62 | 82 | 144 | 64 | 94 | 158 | 12% | 50% | 21% | 12% | 47% | 21% |
| Highest degree is master's (nonterminal) | 55 | 55 | 110 | 57 | 66 | 123 | 11% | 33% | 16% | 10% | 33% | 16% |
| Highest degree is bachelor's | 5 | 26 | 31 | 5 | 27 | 32 | 1% | 16% | 5% | 1% | 14% | 4% |
| Degree status is ABD (all but dissertation) | 2 | 1 | 3 | 2 | 1 | 3 | 0% | 1% | 0% | 0% | 1% | 0% |
| <u>Other</u> | 2 | 10 | 12 | 3 | 11 | 14 | 0% | 6% | 2% | 1% | 6% | 2% |
| <i>January 15, 2009 REVISED</i> NWCCU – UM total, Instr and All; USNWR – Mountain Campus, Instr; Princeton Review – UM Total, Instr; CDS – UM Total | | | | | | | | | | | | |

Standard 4: Faculty – Table 1 – Institutional Faculty Profile
 Profile of Instructional Faculty at The University of Montana for Academic Year 2008-09¹

| Rank and Tenure Status | All Instructional Faculty ² (Number) | | | Full-time Instructional Faculty | | | | | | | | | | | | | | | |
|---------------------------|---|-----------|-------|-----------------------------------|----|------|--------------|----------------|---------|--|---------|---------|---------------------------|-----|-----|------------------------------------|-----|-----|--|
| | | | | Number of Highest Awarded Degrees | | | | | | Academic Year Salary (\$) ³ | | | Years of Experience at UM | | | Average Fall 2008 Credit Hour Load | | | |
| | Full Time | Part Time | Total | Dr ⁴ | M | Bacc | Prof License | Less than Bacc | No Data | Minimum | Average | Maximum | Min | Avg | Max | Min | Avg | Max | |
| Professor | | | | | | | | | | | | | | | | | | | |
| Tenure line | 205 | 8 | 213 | 174 | 31 | 0 | 0 | 0 | 0 | 51,948 | 78,076 | 142,673 | 2 | 20 | 42 | 2 | 12 | 69 | |
| Nontenurable | 5 | 10 | 15 | 3 | 2 | 0 | 0 | 0 | 0 | 52,000 | 76,865 | 115,000 | 0 | 6 | 15 | 6 | 8 | 10 | |
| Associate Professor | | | | | | | | | | | | | | | | | | | |
| Tenure line | 124 | 12 | 136 | 108 | 15 | 1 | 0 | 0 | 0 | 47,537 | 62,871 | 107,729 | 0 | 9 | 32 | 2 | 11 | 42 | |
| Nontenurable | 3 | 3 | 6 | 2 | 1 | 0 | 0 | 0 | 0 | 42,848 | 49,803 | 63,478 | 3 | 9 | 14 | 5 | 8 | 10 | |
| Assistant Professor | | | | | | | | | | | | | | | | | | | |
| Tenure line | 118 | 9 | 127 | 99 | 19 | 0 | 0 | 0 | 0 | 43,000 | 57,015 | 94,930 | 0 | 3 | 15 | 0 | 10 | 42 | |
| Nontenurable | 21 | 58 | 79 | 12 | 7 | 1 | 0 | 0 | 1 | 26,400 | 44,262 | 90,577 | 0 | 5 | 18 | 6 | 13 | 25 | |
| Instructor/Educator (COT) | | | | | | | | | | | | | | | | | | | |
| Tenure line | 33 | 1 | 34 | 5 | 18 | 6 | 0 | 2 | 2 | 33,261 | 48,833 | 64,375 | 1 | 13 | 32 | 3 | 15 | 27 | |
| Nontenurable | 30 | 165 | 195 | 2 | 19 | 4 | 0 | 2 | 3 | 26,187 | 36,544 | 62,063 | 0 | 5 | 23 | 1 | 13 | 44 | |
| Lecturer | | | | | | | | | | | | | | | | | | | |
| Nontenurable | 16 | 9 | 25 | 8 | 6 | 2 | 0 | 0 | 0 | 32,720 | 44,937 | 70,439 | 1 | 8 | 22 | 5 | 11 | 34 | |
| Postdoctoral Scholar | | | | | | | | | | | | | | | | | | | |
| Nontenurable | 1 | 0 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 30,000 | 30,000 | 30,000 | 1 | 1 | 1 | 0 | 0 | 0 | |

¹ Source: The University of Montana Office of Planning, Budget and Analysis, employee database, unpublished data, derived.

² Instructional faculty includes those with instructional FTE of 0.01 or higher.

³ Salaries for faculty on fiscal year (twelve-month) contracts have been adjusted to the academic year (nine-month) equivalent.

⁴ Doctorates, including professional practice doctorates (J.D., PharmD, DPT)

Standard 4: Faculty – Table 1 – Institutional Faculty Profile (continued)
 Profile of Research Faculty at The University of Montana for Academic Year 2008-09⁵

| Rank and Tenure Status | All Research Faculty ⁶ (Number) | | | Full-time Research Faculty | | | | | | | | | | | | | | | |
|---------------------------|--|-----------|-------|-----------------------------------|---|------|--------------|----------------|---------|---------|--|---------|-----|---------------------------|-----|-----|------------------------------------|-----|--|
| | | | | Number of Highest Awarded Degrees | | | | | | | Academic Year Salary (\$) ⁷ | | | Years of Experience at UM | | | Average Fall 2008 Credit Hour Load | | |
| | Full Time | Part Time | Total | Dr ⁸ | M | Bacc | Prof License | Less than Bacc | No Data | Minimum | Average | Maximum | Min | Avg | Max | Min | Avg | Max | |
| Professor | | | | | | | | | | | | | | | | | | | |
| Tenure line | 14 | 2 | 16 | 13 | 1 | 0 | 0 | 0 | 0 | 52,612 | 75,451 | 93,090 | 1 | 14 | 27 | 2 | 6 | 22 | |
| Nontenurable | 4 | 7 | 11 | 4 | 0 | 0 | 0 | 0 | 0 | 62,826 | 71,641 | 97,329 | 13 | 23 | 34 | 4 | 4 | 4 | |
| Associate Professor | | | | | | | | | | | | | | | | | | | |
| Tenure line | 6 | 0 | 6 | 2 | 4 | 0 | 0 | 0 | 0 | 38,784 | 55,304 | 82,436 | 4 | 14 | 37 | 1 | 2 | 4 | |
| Nontenurable | 7 | 7 | 14 | 6 | 1 | 0 | 0 | 0 | 0 | 44,489 | 53,199 | 60,002 | 1 | 10 | 16 | 2 | 6 | 14 | |
| Assistant Professor | | | | | | | | | | | | | | | | | | | |
| Tenure line | 9 | 0 | 9 | 1 | 8 | 0 | 0 | 0 | 0 | 31,493 | 37,714 | 65,000 | 1 | 5 | 17 | 1 | 2 | 3 | |
| Nontenurable | 18 | 12 | 30 | 14 | 3 | 0 | 0 | 0 | 1 | 39,233 | 50,008 | 67,743 | 0 | 7 | 29 | 0 | 3 | 8 | |
| Instructor/Educator (COT) | | | | | | | | | | | | | | | | | | | |
| Tenure line | 1 | 0 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 58,343 | 58,343 | 58,343 | 26 | 26 | 26 | 0 | 0 | 0 | |
| Nontenurable | 2 | 10 | 12 | 0 | 1 | 0 | 0 | 0 | 1 | 26,187 | 33,094 | 40,000 | 0 | 3 | 6 | 5 | 5 | 5 | |
| Lecturer | | | | | | | | | | | | | | | | | | | |
| Nontenurable | 1 | 0 | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 45,691 | 45,691 | 45,691 | 22 | 22 | 22 | 0 | 0 | 0 | |
| Postdoctoral Scholar | | | | | | | | | | | | | | | | | | | |
| Nontenurable | 35 | 4 | 39 | 26 | 1 | 2 | 0 | 2 | 4 | 29,246 | 40,190 | 58,301 | 0 | 2 | 6 | 2 | 4 | 8 | |

⁵ Source: The University of Montana Office of Planning, Budget and Analysis, employee database, unpublished data, derived.

⁶ Research faculty includes those with no instructional FTE.

⁷ Salaries for faculty on fiscal year (twelve-month) contracts have been adjusted to the academic year (nine-month) equivalent.

⁸ Doctorates, including professional practice doctorates (J.D., PharmD, DPT)

**Maureen and Mike Mansfield Library
General Funds Budget Pattern**

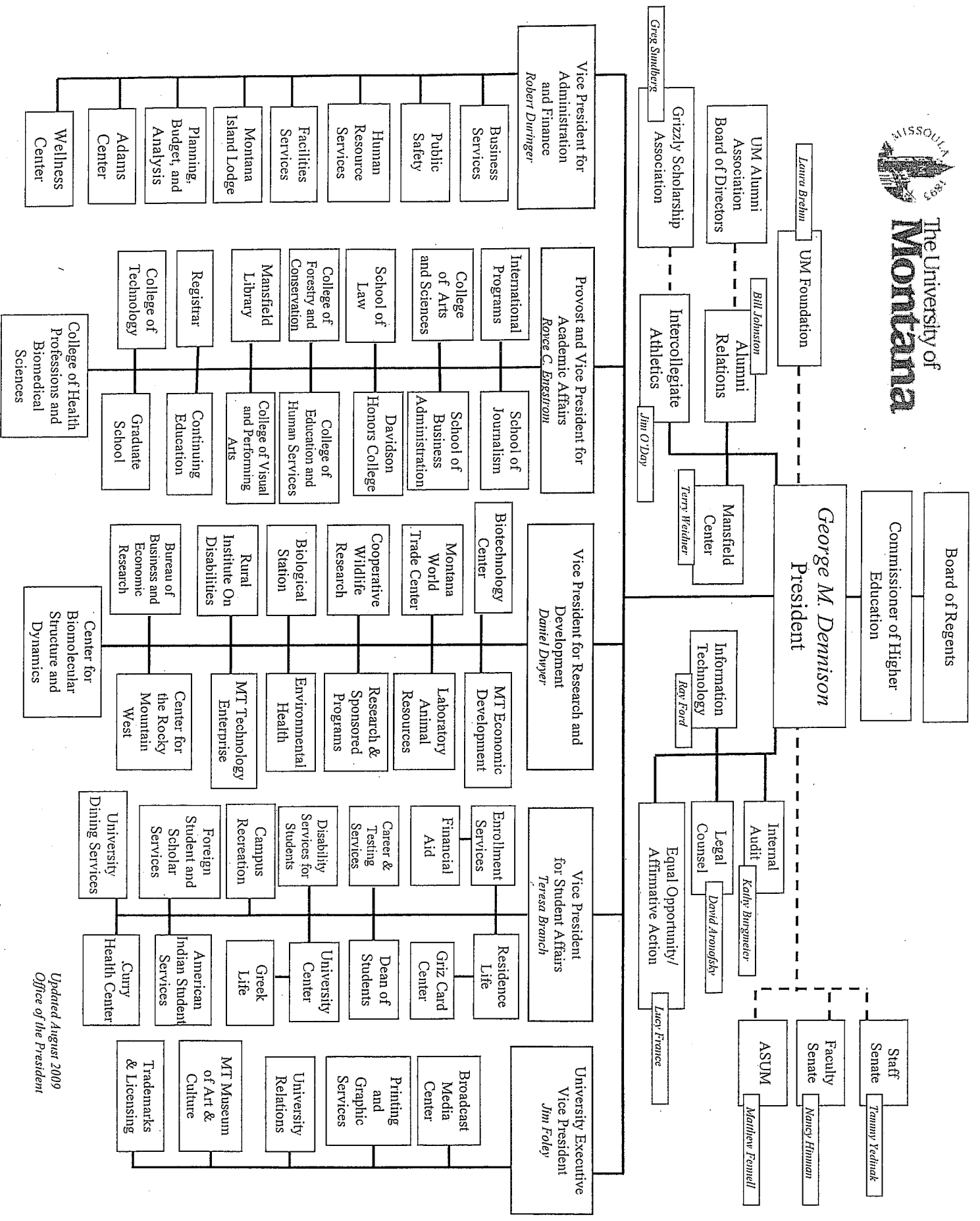
| | FY2009/10 | FY2008/09 | FY2007/2008 | FY2006/2007 | FY2005/2006 | FY2004/2005 |
|---|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| General Operations | | | | | | |
| Faculty | \$839,227.00 | \$ 809,099.00 | \$ 760,745.00 | \$ 753,289.00 | \$ 699,468.00 | \$ 736,572.00 |
| Admin & Professional Staff | \$301,406.00 | \$ 291,376.00 | \$ 281,958.00 | \$ 280,901.00 | \$ 254,557.00 | \$ 249,255.00 |
| Students/Hourly | \$1,150,200.00 | \$ 1,156,450.00 | \$ 1,082,779.00 | \$ 1,064,584.00 | \$ 1,008,230.00 | \$ 987,050.00 |
| TOTAL Personnel | \$2,423,930.00 | \$ 2,361,245.00 | \$ 2,224,573.00 | \$ 2,169,258.00 | \$ 2,041,691.00 | \$ 2,002,072.00 |
| Operations | \$ 214,896.00 | \$ 214,896.00 | \$ 224,896.00 | \$ 224,896.00 | \$ 207,634.00 | \$216,211.00 |
| Total Gen Operations | \$ 2,638,826.00 | \$ 2,576,141.00 | \$ 2,449,469.00 | \$ 2,394,154.00 | \$ 2,266,587.00 | \$2,218,223.00 |
| OTO Funds (Faculty Computers 07 - 10 & Voyager Maintenance for 06) | \$ 6,000.00 | \$ 6,000.00 | \$ 12,720.00 | \$ 5,325.00 | \$ 114,894.00 | |
| Collections Budgets | | | | | | |
| Dept. Initiated orders | \$ 320,000.00 | \$ 360,000.00 | \$ 310,000.00 | \$ 340,000.00 | \$ 340,000.00 | \$ 312,000.00 |
| Library Initiated orders | \$ 300,163.00 | \$ 300,925.00 | \$ 217,396.00 | \$ 320,670.00 | \$ 287,270.00 | \$ 297,606.00 |
| YBP Core Book Approval Plan | \$ 140,116.00 | | | | | |
| Supplemental Fund for Mono & Media | \$ 40,000.00 | | | | | |
| Ebooks and Econtent | \$ 150,000.00 | \$ 140,000.00 | \$ 145,000.00 | \$ 150,000.00 | \$ 147,000.00 | \$609,606.00 |
| Digitization Projects | \$ 950,279.00 | \$ 800,925.00 | \$ 672,396.00 | \$ 810,670.00 | \$ 774,270.00 | \$740,000.00 |
| Total Monographs | \$ 2,430,809.00 | \$ 2,236,000.00 | \$ 1,778,000.00 | \$ 1,050,000.00 | \$ 799,000.00 | \$1,140,000.00 |
| Electronic Resources | \$ 344,000.00 | \$ 395,000.00 | \$ 740,000.00 | \$ 1,080,000.00 | \$ 1,190,000.00 | \$15,000.00 |
| Serials | \$ 10,000.00 | \$ 10,000.00 | \$ 10,000.00 | \$ 15,000.00 | \$ 20,000.00 | \$15,000.00 |
| Binding | \$ 250,000.00 | \$ 250,000.00 | \$ 250,000.00 | \$ 269,000.00 | \$ 319,000.00 | \$319,000.00 |
| Document Delivery | | | | | | |
| Spec Proj OTO Recon | | | | | | |
| Total Collections | \$ 3,985,088.00 | \$ 3,691,925.00 | \$ 3,450,396.00 | \$ 3,224,670.00 | \$ 3,102,270.00 | \$ 2,823,606.00 |
| Total Gen Fund Budget | \$ 6,623,914.00 | \$ 6,268,066.00 | \$ 5,899,865.00 | \$ 5,618,824.00 | \$ 5,368,857.00 | \$5,041,829.00 |
| Special Initiatives - Elect. Resources | | | | | | \$0.00 |
| Provost | | | | | | \$162,000.00 |
| Research & Development | | | | | | \$54,375.00 |
| CAS, CFC, SPAH | | | | | | \$216,375.00 |

**Maureen and Mike Mansfield Library
General Funds Budget Pattern**

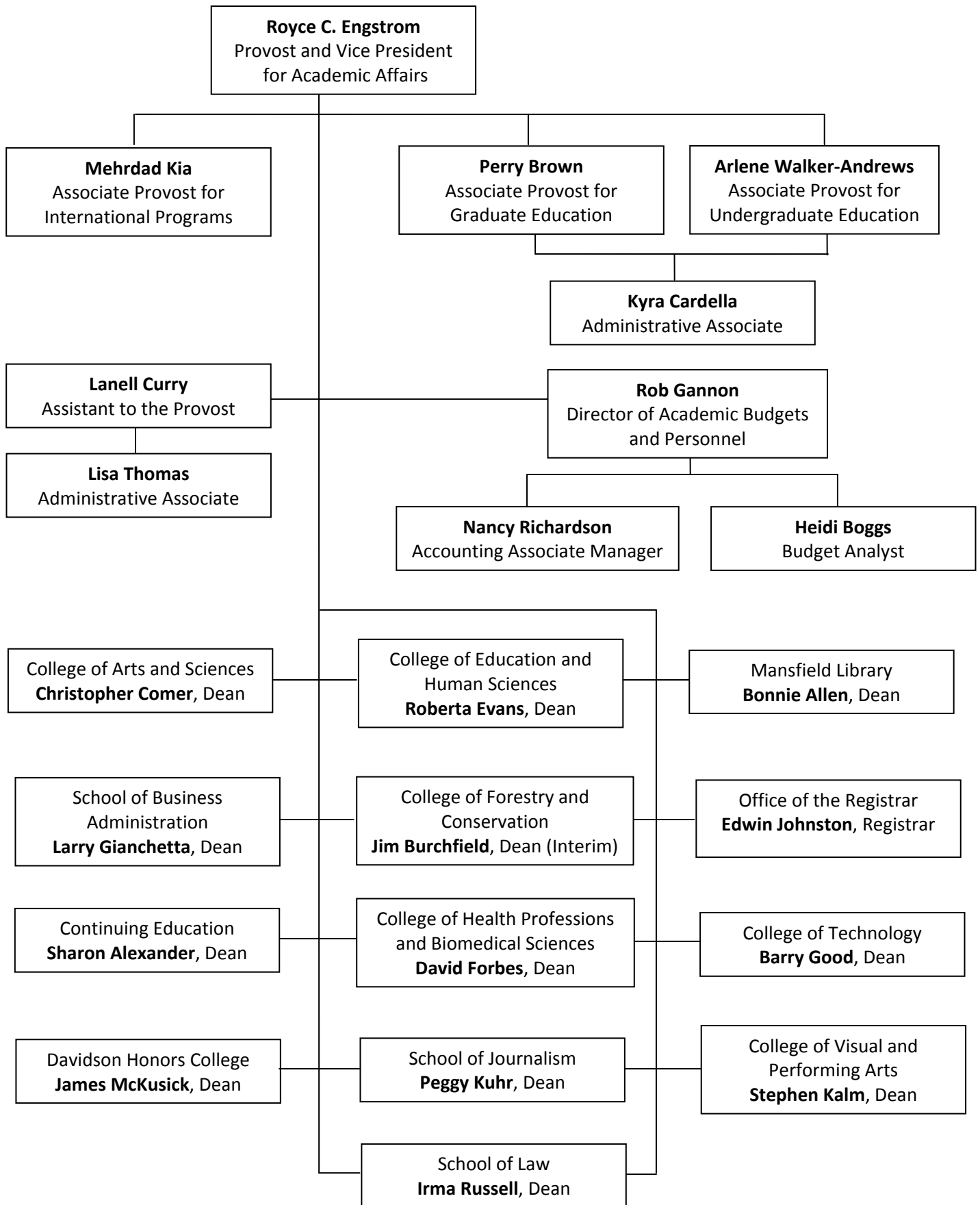
| | FY2003/2004 | FY2002/2003 | FY2001/2002 | FY2000/2001 | FY1999/2000 |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| General Operations | | | | | |
| Faculty | \$ 768,235.00 | | | | |
| Admin & Professional | \$ 248,527.00 | | | | |
| Staff | \$ 973,099.00 | | | | |
| Students/Hourly | \$ 7,090.00 | | | | |
| TOTAL Personnel | \$1,996,951.00 | \$2,027,166.00 | \$2,006,954.00 | \$1,965,247.00 | \$1,881,347.00 |
| Operations | \$219,438.00 | \$306,465.00 | \$360,603.00 | \$197,334.00 | \$137,391.00 |
| Total Gen Operations | \$2,244,995.00 | \$2,333,631.00 | \$2,367,557.00 | \$2,162,581.00 | \$2,018,738.00 |
| OTO Funds (Faculty Computers 07 - 10 & Voyager Maintenance for 06) | | | | | |
| Collections Budgets | | | | | |
| Dept. Initiated orders | \$ 312,000.00 | | | | |
| Library Initiated orders | \$ 337,779.00 | | | | |
| YBP Core Book Approval Plan | | | | | |
| Supplemental Fund for Mono & Media | | | | | |
| Ebooks and Econtent | | | | | |
| Digitization Projects | | | | | |
| Standing Orders | | | | | |
| Total Monographs | \$649,779.00 | | | | |
| Electronic Resources | \$689,012.00 | | | | |
| Serials | \$959,692.00 | | | | |
| Binding | \$30,891.00 | | | | |
| Document Delivery | \$309,367.00 | | | | |
| Spec Proj OTO Recon | \$35,000.00 | | | | |
| Total Collections | \$2,638,741.00 | \$2,385,000.00 | \$2,208,148.00 | \$2,108,140.00 | \$2,107,971.00 |
| Total Gen Fund Budget | \$4,883,736.00 | \$4,718,631.00 | \$4,575,705.00 | \$4,270,721.00 | \$4,126,709.00 |
| Special Initiatives - Elect. Resources | | | | | |
| Provost | \$50,050.00 | \$50,000.00 | | | |
| Research & Development | \$68,000.00 | \$68,250.00 | | | |
| CAS, CFC, SPAH | \$54,375.00 | \$54,750.00 | | | |
| | \$172,425.00 | \$173,000.00 | | | |



The University of Montana



Office of the Provost and Vice President for Academic Affairs
 ORGANIZATIONAL CHART



The University of Montana
Standard 7: Finance - Table 1 - Current Funds Revenues (Public Institutions Only)

| Source (IPEDS Report) | | ACTUAL | | | | | |
|--|--------------|--------------------|----------------|--------------------|----------------|-----------------------------|----------------|
| | | Year 1 (FY07) | | Year 2 (FY08) | | Year 3 (FY09) ² | |
| | | Amount | % ¹ | Amount | % | Amount | % |
| Tuition and Fees | | 82,339,623 | 30.69% | 85,359,066 | 30.70% | 87,754,607 | 29.03% |
| Government Appropriations | | | | | | | |
| Federal | | | | | | | |
| State | | 41,533,783 | 15.48% | 48,206,994 | 17.34% | 53,126,100 | 17.58% |
| Local | | | | | | | |
| Government Grants & Contracts | | | | | | | |
| Federal: | Unrestricted | | | | | | |
| | Restricted | 52,105,763 | 19.42% | 52,073,767 | 18.73% | 60,239,436 | 19.93% |
| State: | Unrestricted | | | | | | |
| | Restricted | 7,355,134 | 2.74% | 7,936,919 | 2.86% | 8,399,757 | 2.78% |
| Local: | Unrestricted | | | | | | |
| | Restricted | 5,839,636 | 2.18% | 7,647,011 | 2.75% | 7,235,442 | 2.39% |
| Private Gifts, | Unrestricted | | | | | | |
| Grants, Contracts | Restricted | 15,096,392 | 5.63% | 19,548,136 | 7.03% | 30,833,131 | 10.20% |
| Investment | Unrestricted | 6,994,620 | 2.61% | 1,997,761 | 0.72% | (1,307,393) | -0.43% |
| Income | Restricted | | | | | | |
| Sales and Services of Educational Activities | | 12,978,904 | 4.84% | 12,586,368 | 4.53% | 14,463,547 | 4.78% |
| Auxiliary Enterprises ⁴ | | 26,914,259 | 10.03% | 28,577,654 | 10.28% | 28,439,713 | 9.41% |
| Other Sources | | 17,156,561 | 6.39% | 14,064,145 | 5.06% | 13,093,606 | 4.33% |
| Independent Operations | | | | | | | |
| Total Current Funds | | 268,314,675 | 100.00% | 277,997,821 | 100.00% | 302,277,946 | 100.00% |

¹ Percentage of Total Current Fund Revenues

² Most recent fiscal year for which audited financial statements are available

⁴ Fee Income for Auxiliaries is included in line titled "Tuition and Fees"

The University of Montana
Standard 7: Finance - Table 1 - Current Funds Revenues (Public Institutions Only)

| Source (IPEDS Report) | PROJECTED | | | | | |
|--|----------------------------|----------------|--------------------|----------------|--------------------|----------------|
| | Year 4 (FY10) ³ | | Year 5 (FY11) | | Year 6 (FY12) | |
| | Amount | % | Amount | % | Amount | % |
| Tuition and Fees | 90,700,000 | 29.77% | 93,400,000 | 30.65% | 96,200,000 | 30.88% |
| Government Appropriations | | | | | | |
| Federal | | | | | | |
| State | 54,400,000 | 17.85% | 49,800,000 | 16.34% | 49,000,000 | 15.73% |
| Local | | | | | | |
| Government Grants & Contracts | | | | | | |
| Federal: | | | | | | |
| | 60,400,000 | 19.82% | 62,000,000 | 20.35% | 65,000,000 | 20.87% |
| State: | | | | | | |
| | 8,500,000 | 2.79% | 8,500,000 | 2.79% | 8,500,000 | 2.73% |
| Local: | | | | | | |
| | 8,500,000 | 2.79% | 8,500,000 | 2.79% | 8,500,000 | 2.73% |
| Private Gifts, | | | | | | |
| Grants, Contracts | 25,500,000 | 8.37% | 20,000,000 | 6.56% | 20,000,000 | 6.42% |
| Investment | (2,000,000) | -0.66% | 2,000,000 | 0.66% | 2,000,000 | 0.64% |
| Income | | | | | | |
| Sales and Services of Educational Activities | 13,400,000 | 4.40% | 13,800,000 | 4.53% | 14,200,000 | 4.56% |
| Auxiliary Enterprises ⁴ | 29,300,000 | 9.62% | 30,200,000 | 9.91% | 31,100,000 | 9.98% |
| Other Sources | 16,000,000 | 5.25% | 16,500,000 | 5.42% | 17,000,000 | 5.46% |
| Independent Operations | | | | | | |
| Total Current Funds | 304,700,000 | 100.00% | 304,700,000 | 100.00% | 311,500,000 | 100.00% |

³ Budget for Current Year

The University of Montana

Standard 7: Finance - Table 2 - Current Funds Expenditures and Mandatory Transfers (Public Institutions Only)

| Functions (IPEDS Report) | ACTUAL | | | | | |
|---|--------------------|----------------|--------------------|----------------|-----------------------------|----------------|
| | Year 1 (FY07) | | Year 2 (FY08) | | Year 3 (FY09) ² | |
| | Amount | % ¹ | Amount | % | Amount | % |
| Education and General Expenditures | | | | | | |
| Instruction | 70,728,029 | 30.47% | 73,437,874 | 29.23% | 76,656,418 | 29.05% |
| Research | 38,731,927 | 16.69% | 39,664,627 | 15.79% | 41,162,269 | 15.60% |
| Public Service | 11,202,000 | 4.83% | 11,934,204 | 4.75% | 12,361,194 | 4.68% |
| Academic Support | 18,953,013 | 8.17% | 22,921,981 | 9.13% | 25,042,439 | 9.49% |
| Student Services | 16,684,067 | 7.19% | 17,674,864 | 7.04% | 18,452,367 | 6.99% |
| Institutional Support | 19,393,566 | 8.36% | 20,673,382 | 8.23% | 21,466,231 | 8.13% |
| Plant Operations & Maintenance | 15,771,777 | 6.80% | 19,942,213 | 7.94% | 19,949,143 | 7.56% |
| Scholarships and Fellowships | 12,270,683 | 5.29% | 13,702,987 | 5.46% | 15,550,438 | 5.89% |
| Educational and General Mandatory Transfer | | | | | | |
| Total Educational and General Expenditures/ Mandatory Transfers | 203,735,062 | 87.78% | 219,952,132 | 87.56% | 230,640,499 | 87.39% |
| Auxiliary Enterprises (Including Transfers) | 28,365,152 | 12.22% | 31,246,655 | 12.44% | 33,276,186 | 12.61% |
| Hospitals (Including Transfers) | | | | | | |
| Independent Operations (Including Transfers) | | | | | | |
| Total Current Funds Expenditures & Mandatory Transfers | 232,100,214 | 100.00% | 251,198,787 | 100.00% | 263,916,685 | 100.00% |

¹ Percentage of Total Current Fund Revenues

² Most recent fiscal year for which audited financial statements are available

The University of Montana

Standard 7: Finance - Table 2 - Current Funds Expenditures and Mandatory Transfers (Public Institutions Only)

| Functions (IPEDS Report) | PROJECTED | | | | | |
|---|----------------------------|----------------|--------------------|----------------|--------------------|----------------|
| | Year 4 (FY10) ³ | | Year 5 (FY11) | | Year 6 (FY12) | |
| | Amount | % | Amount | % | Amount | % |
| Education and General Expenditures | | | | | | |
| Instruction | 81,500,000 | 29.23% | 81,500,000 | 28.65% | 81,500,000 | 28.07% |
| Research | 42,000,000 | 15.06% | 43,300,000 | 15.22% | 44,600,000 | 15.36% |
| Public Service | 12,500,000 | 4.48% | 12,500,000 | 4.39% | 12,500,000 | 4.31% |
| Academic Support | 27,600,000 | 9.90% | 28,200,000 | 9.91% | 28,800,000 | 9.92% |
| Student Services | 19,300,000 | 6.92% | 20,300,000 | 7.14% | 21,300,000 | 7.34% |
| Institutional Support | 21,900,000 | 7.86% | 22,600,000 | 7.94% | 23,300,000 | 8.03% |
| Plant Operations & Maintenance | 20,200,000 | 7.25% | 20,400,000 | 7.17% | 20,600,000 | 7.10% |
| Scholarships and Fellowships | 16,800,000 | 6.03% | 17,600,000 | 6.19% | 18,500,000 | 6.37% |
| Educational and General Mandatory Transfer | | | | | | |
| Total Educational and General Expenditures/ Mandatory Transfers | 241,800,000 | 86.73% | 246,400,000 | 86.61% | 251,100,000 | 86.50% |
| Auxiliary Enterprises (Including Transfers) | 37,000,000 | 13.27% | 38,100,000 | 13.39% | 39,200,000 | 13.50% |
| Hospitals (Including Transfers) | | | | | | |
| Independent Operations (Including Transfers) | | | | | | |
| Total Current Funds Expenditures & Mandatory Transfers | 278,800,000 | 100.00% | 284,500,000 | 100.00% | 290,300,000 | 100.00% |

³ Budget for Current Year

The University of Montana

Standard 7: Finance - Table 3 - Summary Report of Revenues and Expenditures (Public¹ and Private Institutions)

| | ACTUAL | | | PROJECTED | | |
|---|----------------|----------------|-----------------------------|-----------------------------|----------------|----------------|
| | Year 1 (FY07) | Year 2 (FY08) | Year 3 (FY09) ² | Year 4 (FY10) ³ | Year 5 (FY11) | Year 6 (FY12) |
| | Amount | Amount | Amount | Amount | Amount | Amount |
| Education and General | | | | | | |
| Revenues | 241,400,416 | 249,420,167 | 273,838,233 | 275,400,000 | 274,500,000 | 280,400,000 |
| Expenditures | 203,735,062 | 219,952,132 | 230,640,499 | 241,800,000 | 246,400,000 | 251,100,000 |
| Transfers - Mandatory | | | | | | |
| - Non Mandatory | | | | | | |
| Net Excess (Deficit) | 37,665,354 | 29,468,035 | 43,197,734 | 33,600,000 | 28,100,000 | 29,300,000 |
| Auxiliary Enterprises | | | | | | |
| Revenues | 26,914,259 | 28,577,654 | 28,439,713 | 29,300,000 | 30,200,000 | 31,100,000 |
| Expenditures | 28,365,152 | 31,246,655 | 33,276,186 | 37,000,000 | 38,100,000 | 39,200,000 |
| Transfers - Mandatory | | | | | | |
| - Non Mandatory | | | | | | |
| Net Excess (Deficit) | (1,450,893) | (2,669,001) | (4,836,473) | (7,700,000) | (7,900,000) | (8,100,000) |
| Net Operational Excess (Deficit) | 36,214,461 | 26,799,034 | 38,361,261 | 25,900,000 | 20,200,000 | 21,200,000 |

¹ Optional for public institutions

² Most recent fiscal year for which audited financial statements are available

³ Budget for Current Year

The University of Montana
Standard 7: Finance - Table 4 - Sources of Financial Aid

| | | ACTUAL | | | | | | PROJECTED | | | | | |
|---|---|----------|------|----------|------|----------|------|-----------|------|----------|------|----------|------|
| | | FY 2007 | | FY 2008 | | FY 2009 | | FY 2010 | | FY 2011 | | FY 2012 | |
| | | Amount | | Amount | | Amount | | Amount | | Amount | | Amount | |
| | | (\$ 000) | % | (\$ 000) | % | (\$ 000) | % | (\$ 000) | % | (\$ 000) | % | (\$ 000) | % |
| Financial aid to students, all sources | | | | | | | | | | | | | |
| | | 82,476 | 100% | 89,273 | 100% | 106,619 | 100% | 113,150 | 100% | 119,040 | 100% | 125,250 | 100% |
| | <u>Gift aid</u> (grants, scholarships, tuition or fee waivers) | 30,357 | 37% | 32,257 | 36% | 38,969 | 37% | 42,000 | 37% | 42,800 | 36% | 42,600 | 34% |
| | Federal gift aid | 11,542 | 14% | 12,022 | 13% | 13,815 | 13% | 18,900 | 17% | 19,700 | 17% | 19,500 | 16% |
| | Pell Grants | 10,356 | 13% | 10,750 | 12% | 12,436 | 12% | 17,500 | 15% | 18,200 | 15% | 18,900 | 15% |
| | Other federal grants | 1,186 | 1% | 1,272 | 1% | 1,379 | 1% | 1,400 | 1% | 1,500 | 1% | 600 | 0% |
| | State or local government gift aid | 8,561 | 10% | 8,668 | 10% | 9,935 | 9% | 9,900 | 9% | 9,900 | 8% | 9,900 | 8% |
| | Institutional aid and other (scholarships, fellowships, grants) | 10,254 | 12% | 11,566 | 13% | 15,219 | 14% | 13,200 | 12% | 13,200 | 11% | 13,200 | 11% |
| | <u>Loans to students*</u> | 50,803 | 62% | 55,601 | 62% | 65,968 | 62% | 69,600 | 62% | 74,690 | 63% | 81,100 | 65% |
| | Federal loans | 49,493 | 60% | 52,550 | 59% | 62,684 | 59% | 66,300 | 59% | 71,290 | 60% | 77,600 | 62% |
| | Institutional loans | 0 | 0% | 91 | 0% | 118 | 0% | 100 | 0% | 100 | 0% | 100 | 0% |
| | Private loans to students* | 1,309 | 2% | 2,960 | 3% | 3,166 | 3% | 3,200 | 3% | 3,300 | 3% | 3,400 | 3% |
| | <u>Work-study aid</u> | 1,317 | 2% | 1,414 | 2% | 1,682 | 2% | 1,550 | 1% | 1,550 | 1% | 1,550 | 1% |
| | Federal work-study | 973 | 1% | 1,011 | 1% | 931 | 1% | 1,200 | 1% | 1,200 | 1% | 1,200 | 1% |
| | State work-study | 344 | 0% | 404 | 0% | 751 | 1% | 350 | 0% | 350 | 0% | 350 | 0% |
| | <u>Federal PLUS loans to parents</u> | 7,763 | ---- | 7,805 | ---- | 6,757 | ---- | 7,200 | ---- | 7,700 | ---- | 8,300 | ---- |
| | Total | 90,239 | | 97,077 | | 113,376 | | 120,350 | | 126,740 | | 133,550 | |

Note: Projections assume elimination of some federal grants (ACG, SMART), flat scholarships and waivers, and elimination of current Perkins loans.

*Loans to students for which the funds pass through the Financial Aid Office. Does not include loans to parents.

The University of Montana

Standard 7: Finance - Table 9 - Operating Gifts and Endowments-UM Foundation (Public and Private Institutions)

| | ACTUAL | | | PROJECTED | |
|--|---------------|----------------|-----------------------------|----------------------------|----------------|
| | Year 1 (FY07) | Year 2 (FY08) | Year 3 (FY09) ¹ | Year 4 (FY10) ² | Year 5 (FY11) |
| UM Foundation | Amount | Amount | Amount | Amount | Amount |
| Annual Gifts | | | | | |
| Operations Restricted | 5,275,620 | 3,513,964 | 3,868,383 | 4,200,000 | 4,200,000 |
| Operations Unrestricted | 11,740,308 | 12,162,608 | 14,513,151 | 12,800,000 | 12,800,000 |
| Endowments Exclusive of Foundation Gifts | | | | | |
| Plant | 4,755,090 | 1,034,300 | 16,028,429 | 5,000,000 | 5,000,000 |
| Total | 21,771,018 | 16,710,872 | 34,409,963 | 22,000,000 | 22,000,000 |
| Ratio of Annual Gifts to E & G | | | | | |
| Endowment Fund Balance | | | | | |
| Permanent | 77,808,302 | 83,355,425 | 86,388,575 | 86,000,000 | 86,000,000 |
| Term | 68,746,232 | 70,593,269 | 39,110,013 | 39,000,000 | 39,000,000 |
| Quasi | 6,720,732 | 6,561,957 | (4,860,357) | - | - |
| Total | 153,275,266 | 160,510,651 | 120,638,231 | 125,000,000 | 125,000,000 |

¹ Most recent fiscal year for which audited financial statements are available

² Budget for Current Year

Note: If applicable, explain/describe Foundation relationship and prepare separate statement for Foundation gifts to the institution.

The University of Montana

Standard 7: Finance - Table 9 - Operating Gifts and Endowments-Grizzly Scholarship Association (Public and Private Institutions)

| | ACTUAL | | | PROJECTED | |
|--|---------------|----------------|-----------------------------|----------------------------|---------------|
| | Year 1 (FY07) | Year 2 (FY08) | Year 3 (FY09) ¹ | Year 4 (FY10) ² | Year 5 (FY11) |
| Grizzly Scholarship Association | Amount | Amount | Amount | Amount | Amount |
| Annual Gifts | | | | | |
| Operations Restricted | 1,193,880 | 1,257,065 | 1,469,315 | 1,475,000 | 1,500,000 |
| Operations Unrestricted | 360,457 | 469,254 | 472,305 | 500,000 | 500,000 |
| Endowments Exclusive of Foundation Gifts | | | | | |
| Plant | | | | | |
| Total | 1,554,337 | 1,726,319 | 1,941,620 | 1,975,000 | 2,000,000 |
| Ratio of Annual Gifts to E & G | | | | | |
| Endowment Fund Balance | | | | | |
| Permanent | - | - | - | - | |
| Term | 913,841 | 1,073,083 | 1,200,195 | 1,200,000 | 1,200,000 |
| Quasi | 950,771 | 1,063,895 | 821,610 | 830,000 | 950,000 |
| Total | 1,864,612 | 2,136,978 | 2,021,805 | 2,030,000 | 2,150,000 |

¹ Most recent fiscal year for which audited financial statements are available

² Budget for Current Year

The University of Montana
Standard 7: Finance - Table 10 - Capital Investments (All Institutions)

| DO NOT INCLUDE DEPRECIATION EXPENSE | ACTUAL | | | PROJECTED | |
|---|----------------|----------------|-----------------------------|-----------------------------|----------------|
| | Year 1 (FY07) | Year 2 (FY08) | Year 3 (FY09) ² | Year 4 (FY10) ³ | Year 5 (FY11) |
| | Amount (\$) | Amount (\$) | Amount (\$) | Amount (\$) | Amount (\$) |
| Land ³ | | | | | |
| Beginning Cost | 14,432,996 | 14,432,996 | 14,666,800 | 21,556,345 | 23,556,345 |
| Additions | - | 233,804 | 6,889,545 | 2,000,000 | 1,000,000 |
| Deductions | - | - | - | - | - |
| Ending Cost | 14,432,996 | 14,666,800 | 21,556,345 | 23,556,345 | 24,556,345 |
| Buildings | | | | | |
| Beginning Cost | 150,871,044 | 150,871,044 | 184,635,073 | 190,556,999 | 231,205,650 |
| Additions | - | 33,816,029 | 5,921,926 | 40,648,651 | 1,457,530 |
| Deductions | - | 52,000 | - | - | - |
| Ending Cost | 150,871,044 | 184,635,073 | 190,556,999 | 231,205,650 | 232,663,180 |
| Building Improvements | | | | | |
| Beginning Cost | 98,309,543 | 100,778,022 | 102,239,736 | 109,552,225 | 111,333,610 |
| Additions | 2,468,479 | 1,512,946 | 8,298,640 | 1,781,385 | 8,059,745 |
| Deductions | - | 51,232 | 986,151 | - | - |
| Ending Cost | 100,778,022 | 102,239,736 | 109,552,225 | 111,333,610 | 119,393,355 |
| Furniture and Equipment | | | | | |
| Beginning Cost | 33,274,885 | 36,757,635 | 39,747,716 | 45,003,945 | 51,829,890 |
| Additions | 3,853,581 | 4,897,679 | 6,225,962 | 6,825,945 | 5,000,000 |
| Deductions | 370,831 | 1,907,598 | 969,733 | - | - |
| Ending Cost | 36,757,635 | 39,747,716 | 45,003,945 | 51,829,890 | 56,829,890 |
| Library Books | | | | | |
| Beginning Cost | 44,770,692 | 46,305,737 | 47,476,744 | 48,727,857 | 50,086,857 |
| Additions | 1,535,045 | 1,291,042 | 1,251,113 | 1,359,000 | 1,400,000 |
| Deductions | - | 120,035 | - | - | - |
| Ending Cost | 46,305,737 | 47,476,744 | 48,727,857 | 50,086,857 | 51,486,857 |
| Museum and Art | | | | | |
| Beginning Cost | 14,983,288 | 15,702,616 | 16,030,999 | 16,210,959 | 16,210,959 |
| Additions | 749,829 | 328,383 | 295,750 | - | 300,000 |
| Deductions | 30,500 | - | 41 | - | - |
| Ending Cost | 15,702,616 | 16,030,999 | 16,326,709 | 16,210,959 | 16,510,959 |
| Construction in Progress | | | | | |
| Beginning Cost | 28,339,138 | 43,213,643 | 37,287,404 | 50,425,629 | 20,398,266 |
| Additions | 17,341,952 | 29,276,484 | 34,248,336 | 12,402,673 | 4,103,313 |
| Deductions | 2,467,447 | 35,202,723 | 21,110,111 | 42,430,036 | 9,517,275 |
| Ending Cost | 43,213,643 | 37,287,404 | 50,425,629 | 20,398,266 | 14,984,304 |
| Debt Service | | | | | |
| Principal | 4,700,452 | 5,194,890 | 5,223,159 | 5,200,000 | 5,300,000 |
| Interest | 6,298,352 | 6,413,729 | 6,075,222 | 6,100,000 | 5,800,000 |
| Depreciation (Private Institutions Only) | | | | | |

¹ Most recent fiscal year for which audited financial statements are available
² Budget for Current Year
³ The category land includes the cost of land, land improvements, and infrastructure.

The University of Montana
Standard 7: Finance - Table 10 - Capital Investments (All Institutions)

| SOURCES OF FUNDS (Construction in Progress) | | | |
|---|-------------------------|---|---|
| Project | Budget Authorization | Total Expenditures through June 2009 | Funding Source |
| Skaggs Addition Basement | 806,930 | 458,237 | Grants |
| ISB 2nd Floor | 790,555 | 649,995 | Series J |
| Law School Expansion | 14,900,000 | 13,098,970 | Donations, LRB, Grant, Series J |
| Research Facility | 13,724,510 | 13,327,070 | 2005 Series J Revenue Bonds |
| Native American Studies Center | 8,503,330 | 4,145,688 | Donations |
| Northern Tier Network Pipeline | 1,000,000 | 123,675 | Intercap Loan |
| PE complex Electrical | 400,000 | 134,027 | Intercap Loan, Institutional |
| Steamline Auxiliary Upgrade | 458,600 | 52,549 | 2005 Series J Revenue Bonds |
| Phyllis J Washington Education Center | 11,533,709 | 9,426,928 | Donations, State, Series I Deferred Maint, Aux, Plant |
| | 52,117,634 | 41,417,139 | |

**The University of Montana, Missoula
Vice President for Administration and Finance
FY 2010 Organizational Chart**

