

PEER REVIEW REPORT

**University of Montana
Office of Residence Life**

December 2007

**Peer Review Team:
Dr. Beth McCuskey
Dr. David McKelfresh
Dr. Grant Sherwood**

Introduction

This report summarizes the observations, findings and themes of the Consulting Team that was invited to the University of Montana to participate in a comprehensive review of the Department of Residence Life. The charge of the Peer Review/Consulting Team was to do a comprehensive review of the Residence Life Program focusing on the following general areas: Financial Management; Facilities; Programs and Human Resources. It was agreed that the review would take into consideration industry standards for good practice as set forth by both the Association of College and University Housing Officers International (ACUHO-I) and the Council for the Advancement of Standards (CAS).

“The Residence Life Office(RLO) provides student housing at University Villages, Lewis and Clark village, and the residence halls that contributes to the living/learning environment of the University of Montana. The mission of Residence Life includes providing co-curricular educational, personal development, and social programs that support students and institutional goals as well as nurture the spirit and principles of community living. We provide facilities that are healthy, safe and student preferred at a competitive market cost. Lastly, we balance immediate student needs with our long-term stewardship responsibilities to the University and maintain fiscal responsibility and operational effectiveness.”
(Residence Life Mission Statement, June 2005)

The three members of the Peer Review Team (PRT) were:

Dr. Beth McCuskey, Director of Residence Life and Dining, University of Wyoming
Dr. David McKelfresh, Executive Director of Assessment, Colorado State University
Dr. Grant Sherwood, Assistant Vice President (emeritus), Colorado State University

Two site visits to the campus were conducted by the PRT. The first visit occurred June 10-13 and focused on meeting members of the Residence Life and Student Affairs Staff, touring facilities, meetings with key campus administrators and discussing expectations for the review. The first visit also helped solidify a plan of action for the second site visitation which was scheduled for September 23-26. In September, the PRT spent the majority of their time meeting with various staff, administrators, faculty and students who are stakeholders in the University of Montana Residence Life Program. The objective of these meetings was to gain comprehensive and diverse perspectives on management practices, services, programs and facilities under the direct control of the Residence Life office. (Copies of both site visitation schedules including contacts are available in Appendix A.)

Prior to the first site visit, the PRT was mailed a variety of materials related to the review. Among these materials were organizational charts, sections from procedural manuals, planning documents, strategic initiatives, budget spreadsheets, annual reports, survey results and other publications describing programs and services of the Residence Life Office. These resources assisted the PRT in developing an understanding of the institutional culture and unique qualities of the University of Montana in addition to options available to students who live in campus residential facilities.

Financial Management

Observations

It is very clear that Residence Life staff are good stewards of financial resources. This was evident from many angles, including the investments made in the facilities and the compliments shared by all administrators engaged in financial relationships with the department. Financial management is clearly strength of the department: there is much to be proud of.

Detailed below are some ideas that the University of Montana Residence Life Office (RLO) may wish to consider further as the campus strives to move into the future.

Sources of Revenue

Residence Life earns approximately \$12.5M annually with nearly 60% of revenues (or about \$7.2M) being generated by residence halls. Approximately \$5.2M is generated by University Villages and Lewis and Clark apartments, and the remainder by the department's technology program.

A major strength of the department is the variety of living options offered. As student tastes and preferences change over time, the RLO has responded with new or renovated spaces such as the pods at Miller and the new apartments at Lewis and Clark. This approach has financial ramifications as well. By providing a variety of living options, the department has diversified itself from traditional double rooms.

The RLO has also engaged in entrepreneurial activities with much success. For example, the department purchased storage cubicles for \$26K and rents them to students. The initial cost was recouped after a year and a half and now the program generates revenue of over \$20K per year. Perhaps this is a program that could be expanded to apartment areas.

The department also rents the rooftop on Jesse Hall for cell tower use, charges for laundry in the apartments, and generates over \$200K in technology fees for its residential network. Residence life did decide to build laundry and cable television charges into room fees to make these services "free" for students in residence halls. This effort was designed to enhance the department's retention efforts.

Within the last year, the Griz Card was added to the department's operations. Residence Life plans to operate the card office for 6 months and then to develop a strategic plan. It is important that the card function be established to at least break even financially, if not to generate additional revenues. The RLO does receive Short Term Investment Income (STIP Income) for cash deposits made on the Griz Card. Because of this and that the card can be used off campus with a 4% return to the department, opportunities do exist to generate revenues.

One opportunity that the RLO might want to explore is a summer conference function. Currently it appears that there is a campus need to centrally coordinate summer groups. This may be an

opportunity to generate additional revenues through providing a coordinating function as well as to maximize space usage in the summer.

Operational Efficiencies

The Residence Life Office maintains an extremely lean operation. Of the \$12.5M in budgeted revenue, less than one third (32%) is targeted for salaries and benefits. This reflects the department's commitment to hiring student employees, and also its dedication to cost controls. In comparison, The University of Wyoming and Colorado State University's personnel cost to revenue ratio is 40 percent and 44 percent respectively, but when comparing, please understand that these institutions also include Dining Services in their budgets.

Unfortunately this low ratio can also reflect that salaries and wages are not competitive. This was apparent through conversations with staff who perceive that the local market has overtaken campus salaries. Additionally, this is seen when comparing selected departmental salaries to peers. For example, according to CUPA, the Director of Residence Life position's salary is less than 93 percent of the median salary for housing directors at comparable institutions.

Another example of operational efficiency is the RLO managing its own custodial and maintenance functions. Staff noted a 28 percent savings when work order responsibilities were transferred to the department. Facility operating costs were also reduced through a commitment to energy efficiency. The department is making strides in converting light fixtures to fluorescent, adding instant hot water heaters, and converting single-pane windows to double-paned. Not only do these changes affect the bottom-line financially, they also demonstrate a commitment to sustainability.

Finally, the RLO also successfully renegotiated removing telephone lines from student rooms. Like many campuses, the University of Montana recognized that students preferred their cell phones to their room phones. By renegotiating the arrangement with Telecommunications, the department was able to save nearly \$200K in telecommunication expenses. As part of the arrangement, however, the department agreed to pay for a portion of the campus dispatch office as well as to fund additional bandwidth needs for student housing. The efforts behind re-conceptualizing the telecommunications fee structure on campus were significant and commendable.

Overall, the Residence Life Office is quite adept at financial management. Throughout our visit, we repeatedly heard that department solves problems, and can always be counted on to meet their fiduciary obligations. This is a testament to the leadership and to the dedication of the staff.

Enrollment and Occupancy Management

The Residence Life Office appears quite adept at managing occupancy levels in the residence halls and apartments. With the exception of Lewis and Clark, all are budgeted in the low 90 percent range and appear to meet budget targets. Not only does this reflect sound financial management, it demonstrates a willingness of students to live in the residence halls. Lewis and Clark, however, have been budgeted at 82 percent, reflecting lower summer occupancy and the

break between semesters. One opportunity here is to explore ideas to enhance summer occupancy such as lower monthly cost leases if rented for 12 months; or summer usage of the facility for long-term conference groups.

Room fees at the University of Montana appear to be reasonable when compared to selected peer institutions (Appendix B). At this point, however, they are approximately 9.6 percent higher than peers selected for the sample, which may constrict the ability to raise fees in any significant way. Keep in mind however, that one of the institutions in the sample has traditionally reported very low room fees, which does tend to skew the results. The same data demonstrates that the University of Montana has had relatively modest room fee increases over the last five years, averaging a little more than 14 percent compared to this peer group's 19 percent. The University will need to explore these issues in relation to its defined peer group.

One red flag that the University is paying attention to is the projected decline in high school graduates in the state of Montana. According to data from the Integrated Postsecondary Education Data system (IPEDS), graduates peaked in 1999 and are projected to decline through 2015-2016. Between 2006-07 and 2015-16, state high school graduates are projected to decline by 18.4 percent (Appendix C). This will have an impact upon enrollments. To mitigate this decline, and to improve the fall to fall retention rate for new freshmen, the University of Montana hired a consultant, (Teresa Farnum & Associates) to help with retention initiatives. The RLO is involved in these discussions. Additionally, the campus has stepped up recruiting out of state and internationally.

One initiative that has been successful is the investment in a scholarship program for non-resident students. If the student agrees to live in the residence halls beyond their first year, they continue to be eligible for these scholarship resources. One estimate suggested that for \$100K invested, the University earned an additional \$900K from new students.

Financing Residence Life Facilities

Residence Life programs across the nation are confronting many of the same issues regarding the deferred maintenance of their facilities. The University of Montana is to be commended for its efforts in this area. It was apparent that resources have been targeted to upgrading and maintaining residence hall and apartment facilities. This not only requires the diligence of departmental staff, but the support of campus administrators.

With that said, the campus has defined a very aggressive schedule for further improving their facilities. This includes \$63M for major improvements as well as an additional \$10M for smaller projects planned to be accomplished over a ten year cycle.

A target of \$2M per year is consistent with several industry benchmarks based on the value of facilities. However, in the 12 year period ending in 2006, the RLO has invested an average of \$741K per year.

The RLO has also borrowed aggressively to accomplish facility goals. This includes two major bonded projects: one in 1993 for \$22M to construct a new 200 bed residence hall (Pantzer Hall)

and refurbish five facilities plus enhance the computer backbone; the second in 2002 for \$17M to construct the new Lewis and Clark apartment complex. Funds for two smaller projects were also bonded. In total, over \$42M has been borrowed since 1993 for Residence Life facility projects.

The existence of a departmental facility master plan demonstrates a continued commitment to investing in residential facilities. It can also serve as a tool to use as broader financial decisions are made on campus such as when setting fees or when making financial decisions regarding auxiliary revenue streams.

To make the best use of the plan, it must be continually updated to reflect actual funds invested as well as increasing costs of projects. (Appendix D) shows three different levels of construction inflation: three percent, 6.5 percent, and 10 percent applied to the \$63M of capital needs and the annual needs of \$2M. The chart compares these projections to the average amount invested in facilities escalated at five percent per year, a moderately ambitious revenue increase. As you can see, projected facility needs escalate sharply over time, even with revenue increases applied.

The departmental master plan demonstrates the significant financial resources necessary to continue facility investment. Through continually updating the document, the department will have ready access to data and can make its case for financial support even more compelling.

Importance of Sound Financial Relationships

Sound relationships with financial officers are a necessary condition for successful financial management. Good relationships support the ability to have the difficult conversations regarding priority for use of resources, fee setting, and long range financial planning. It is clear from the conversations on campus that the housing administrators are perceived as excellent financial managers. Relationships also appear to be very solid.

Financial acumen is arguably one of the most important skills necessary for the Senior Housing Officer position at Montana. This is true because budgets tend to be tight and there is considerable pressure upon the department to fund a multitude of priorities—some directly related to student housing, others, not. Additionally, there tends to be an aggressive approach to leveraging resources to maximize their impact. This can carry risk.

With this said, Ron's upcoming retirement will be a key transition point for the department. When hiring for a senior housing officer, it will be necessary to seek a seasoned financial administrator who can make difficult departmental decisions about priorities, and who can quickly gain the respect of campus financial officers. A key strategy will be to seek a director who can balance the financial goals of the RLO with the programmatic dedication to students.

Auxiliary Contributions

The Residence Life Office currently pays six percent of its expense budget to central administration for an assessment or overhead charge. While six percent is fairly consistent with comparators, this amount must be taken in the overall context of the department's financial obligations. In the University of Montana's case, an additional \$60-70K is moved to the Office

of the Vice President for Student Affairs, and \$30K is given to the state. These administrative assessments amount to approximately \$539,165.

The Office of the Vice President for Student Affairs also pools funds from all of the Student Affairs auxiliary units to distribute for capital projects based upon divisional priorities. In the five year period ending in 2006, Residence Life contributed an annual average of \$613,000 per year to this pool, and received an average of \$383,000 through the fund's redistribution. University Villages also contributes separately to this pool, with contributions essentially breaking even during this same time period. (An average of \$259,000 contributed, and \$265,000 received).

When examining the inflows and outflows to this pool during this five-year snapshot, it appears that some years funds have been transferred from this pool to the general fund, and in one case to the capital campaign. However, the largest contributor overall is the RLO, with one-third of the resources in this pool coming from the department's net revenues. On the other hand, only one-fifth of the fund's distributions were targeted toward Residence Life funding priorities. When University Villages are added to the mix, approximately 47 percent of the fund had been generated by the RLO; while 34 percent of the resources are targeted that direction.

The philosophy behind auxiliary operations varies from campus to campus, but in general, auxiliary units must cover their direct expenses, while also making contributions to central administration to offset costs incurred on behalf of the auxiliary. It's important to note that there are multiple approaches to developing cost structures – everything from allocations of actual costs to a fixed amount or percentage. Where auxiliary administration varies is in the expectations for contributions beyond covering these costs.

In Montana's case, the Residence Life department is contributing in excess of \$1M per year for administrative purposes when combining the assessments and the net contribution to the Student Affairs auxiliary pool. We suggest a strategy to review these contributions in light of the continued facility needs of the department.

In addition, operating fund balances appear to be inadequate for the auxiliary operations they support. A fund balance of \$2M makes it very difficult if an operating emergency were to take place. It may be prudent to consider ways to bolster this account to be healthier over time.

Debt Burden

The Residence Life Office is currently carrying a debt burden of more than 30 percent of total revenues. Thus for every dollar a residence hall or apartment student pays, nearly one-third of it is absorbed by debt. Correspondingly, the debt burden at Colorado State University and the University of Wyoming is 8.5 percent and 8.8 percent respectively, but again, these campuses include dining obligations and revenues in their budgets.

In addition to the existing debt burden, the University made a decision to refinance debt to add an additional six years to the repayment schedule. Resources were used to fund necessary improvements to residence hall facilities at branch campuses. While the debt was restructured to

allow for the savings in annual debt service to eventually be used to offset maintenance, the long term nature of these savings vis á vis the possible long term needs of the campus make such a return to the RLO questionable.

While bond debt can be refinanced later to mitigate these concerns, there is some risk associated with the debt markets and whether such efforts will be viable in the future.

The debt burden issue fundamentally comes down to a question of risk. How risk tolerant is the institution? Allowing latitude for variations in risk among institutions, it is still apparent that the RLO is bearing a significant burden for many years to come. This issue will affect the ability to invest further in residential facilities. Combining debt with other residence life financial commitments also makes it difficult to invest in the program itself.

There is no easy answer to this situation. In the short term, the institution may need to reassess its position regarding the RLO's ability to incur additional expenses. This will significantly alter the short run flexibility of the institution to find resources, but can build a healthier program in the future.

Themes

1. One of the RLO's greatest strengths is its effective financial management. This is evidenced through the compliments made by campus administrators as well as in a variety of the decisions made by the department. This is a testament to Ron Brunell and his leadership as well as the strong staff support in this area.
2. Occupancy management is also strength of this department. Occupancy is healthy and repeatedly the PRT heard of strategies the department has employed to bolster occupancy in residence hall and apartment facilities. The RLO may wish to take a critical look at Lewis and Clark to see whether occupancy can be bolstered there as well. They are fabulous facilities and perhaps a longer term lease, at a discounted fee, may be appropriate.
3. The RLO has engaged in a variety of opportunities geared to toward building additional revenues beyond room and rent fees. This includes a variety of entrepreneurial activities such as cell tower rental, storage cubical rental, and assuming responsibility for the Griz Card. Additionally, where appropriate, the RLO has backed off of some revenue generating activities to include them in room fees. This can help with occupancy management. One suggestion is to explore building technology fees into room rates for the same reason.
4. Financially, the RLO does have a significant debt burden, and transfers significant funds outside of the department to support broader initiatives. The PRT suggests that the University of Montana take a critical look at these transfers to explore whether there may be opportunities to build revenue streams in other places to offset these contributions. Ideas include fee increases in other auxiliary units to build the Student Affairs capital pool, receiving STIP income dedicated to facility improvements, and room fee increases in branch campuses to offset debt contributions used for their benefit. The campus has already supported the RLO by revamping telecommunications fees (to support the loss of land line

revenue). Strategies such as these are important, and may help the department fund initiatives such as those below.

5. There is no industry standard regarding how much money should be held in reserve for emergencies. Some campuses rely on a fixed percentage, while others look at covering operating expenses for a certain time period – often 3 months. The PRT suggests the University determine a benchmark reserve level and seek to build the fund balance over time.
6. Several external issues will likely affect the RLO in the near future. Minimum wage increases will add further stress to the budget. A declining high school population in the state may affect occupancy. We suggest that the department establish a priority system for further facility improvements based upon varying levels of occupancy to mitigate this possibility. Additionally, building new facilities at this time, such as developing the South Campus, may not be prudent without conversations regarding potential enrollment declines.
7. Like many campuses, the RLO at the University of Montana bears a significant responsibility to find resources to fund an aging facility infrastructure. Their work in this area thus far has been admirable. It is clear that there has been significant investment in the department's physical plant. Having a master plan is also admirable, but resources are scarce. It is critical to find the resources to further invest in the facilities. Further debt burden appears to not be an option without additional resources to dedicate to the debt. Possibilities include further debt refinancing or heavy fee increases.
8. The RLO relies heavily on student staff to perform many functions typically performed by full-time or professional staff. This is one of the hallmarks of the department and an opportunity for students to be truly engaged in very meaningful work. However, there may be a time where the department is called upon to add professional staff to support programmatic efforts. The regional accrediting agencies, for example, are focusing on campus commitments to student learning. It will be difficult to shift the focus to student learning and assessing learning without professional staff support. Additionally, it appears that some of the staff salaries are not competitive. This will be another area that needs financial support.

Finally, the retirement of key individuals in the division brings about opportunities for re-conceptualizing auxiliary management. There may be efficiencies gained by combining key functions such as residence life and dining, or potentially auxiliary management overall. This may also free up resources to consider funding professional live-in staff or further investing in facilities.

Facilities

Observations

In general, the residential facilities at the University are of a functional design, in good repair and appear to meet the needs of the student body. There are different generations of housing available to students with certain living environments being in higher demand than others. The first generation of buildings (Elrod 1923 thru Aber and Elliot Village 1968), are more traditional in nature and are characterized by double loaded corridors or traditional apartments. In the apartment areas, Craighead and Sisson also fall into this first generation category and appear to be in dire need of a total renovation or replacement.

The second generation of buildings (Pantzer, Toole Village and the remodeled Miller) are more modern and appear to be increasingly popular with students. The third generation is represented by Lewis and Clark Village constructed in 2004. This was the first apartment style housing designated for single upper class and graduate students. The PRT was very impressed with the design of this facility.

Residence Life appears to take great pride in being good stewards of their facilities. Although there is constant need for repair/replacement particularly in the older buildings, they continue to effectively serve students. Routine maintenance appears to be done in a timely manner and student consumer's thought highly of the work of the custodial staff in keeping the buildings clean and attractive.

As one would suspect, the PRT was provided many perspectives on the facilities. Students living in the Residence halls thought responses to work orders were completed in a timely way and indicated there were very few problems with service, cleanliness or safety/security issues. Students did indicate a concern over the quality of their mattresses. Privacy was another concern of students and demand for single rooms appeared to exceed supply. Technology upgrades access to laundry service without charge and security systems were all viewed very positively by residents. Demand for spaces during the academic year period has been historically strong with occupancy figures averaging over 92 percent during the past decade.

Students living in the Villages and Apartment areas were a bit more critical of response times to work orders particularly during non regular work hours. They indicated that most residents were pleased with the cleanliness/state of repair of their units when they moved in and thought the value of the unit they were occupying was appropriate for the rental fee charged. Residents and staff indicated that more green space and shared community space would go a long way in promoting a sense of community. Security issues were of some concern, mostly related to families with small children and not directly related to the buildings themselves. Again, average occupancy levels over the past decade in the University Villages are excellent at over 93 percent. This is twelve month data with most unoccupied time due to apartment turnovers and renovation and not demand issues.

Supervisory staff comments regarding the facilities were supportive and complimentary of the work done by both maintenance and custodial crews. Recommendations ranged from increasing

access to technology to creating more single rooms. Although significant attention appears to be paid to safety/security issues, comments were made that included a need for more training in fire safety and evacuation procedures.

In general, the PRT found the housing facilities at the University to be safe, clean and well maintained. Student privacy, noise and the development of appropriate academic environments will continue to be issues in these high density campus housing environments. A commitment to students with physical disabilities has been addressed in recent remodel and new construction projects. Although some residential facilities are not accessible by wheel chair, there is good diversity of offerings for those needing special accommodations. These accommodations should be cost neutral for students.

Facility Audit and Long Range Planning

It appears that great thought and care has gone into both the planning of new facilities and the upgrading of older ones. Evidence for this can be found in various documents including the Residence Life Facility Master Plan (2005) Since 1995 over 50 million dollars has been spent on facility maintenance and capital improvements. Master Plans have been developed by the RLO through the year 2011 that calls for an additional \$63M needed for major renovation projects with another \$2M needed per year for annual maintenance. Given current operations, these goals will be very difficult to accomplish. It will be a significant financial challenge to stay competitive with the Off-Campus Market.

Development of new facilities related to the Campus Master Plan

During the course of our visits many comments were made regarding the expansion of the South Campus. Additional housing units seem to be a strong consideration in this expansion, particularly in light of the University's intended interest in growing the number of enrolled graduate students. Again, the Review Team feels these goals are admirable, but cautions on overbuilding given the demographic data represented by projected future Montana high school graduation rates and the increased competition to attract out of state students. The Campus Master Plan outlined three significant recommendations for the Residence Life Office:

1. Work with the Missoula community to maintain and retain the residential character of neighborhoods affected by the campus community and develop creative solutions to the problems of affordable housing throughout the city.
2. Develop additional housing to accommodate single students and students with dependents who choose to live on campus or elsewhere in the community. This kind of development will not necessarily be traditional residence halls but may include pod, suite, and apartment style facilities. This would provide housing that offers students the independent living styles they desire, thereby lessening the impact to the surrounding neighborhoods and the Missoula community. Any housing plan needs to sustain the positive financial and programmatic aspects of the existing residence life program and be viable for private investors.

3. Continue the effort to make facilities-residence halls, University Villages, and Lewis and Clark Village- attractive living options for students by meeting their technology needs and living preferences. This will be accomplished through improvements of existing housing facilities and new construction as deemed appropriate and financially feasible.

Deferred Maintenance

The current value of RLO facilities at the University of Montana exceeds \$145M. ACUHO-I has benchmarked the annual need for capital improvements and replacement items at approximately 1.5 percent of this amount. Over the past ten years, Residence Life has been able to fund an average of only \$750K annually, thus meeting only 50 percent of this goal. What is happening at the University of Montana is a national phenomenon. Rates and revenue streams from operations do not support the ongoing needs of aging facilities. While the University has done a good job of prioritizing residential projects the needs are escalating at a much faster pace particularly in this situation where a significant number of the spaces were built over 40 years ago.

The Competitive Missoula Housing Environment

Although no formal assessment of rates and services in the Missoula housing market was studied by the consulting team, there were several indications that new construction projects and special incentives to lure students to the off-campus market were impacting demand for on campus housing. Convenience and quality facilities/services appear to be driving on campus housing demand and the PRT endorses strategic renovation projects that upgrade existing facilities.

Themes

1. Students generally felt good about their campus living arrangements in terms of cleanliness, response to maintenance issues and safety/security.
2. Although there has been good planning by the RLO for future physical improvements the process seemed to lack direct student input. This lack of understanding/input also carried over to the custodial and maintenance staff members who deliver daily services.
3. The campus community leadership including faculty believe that the RLO is sensitive to the needs of students related to quality housing options and see the RLO working in partnership with physical plant personnel in meeting these needs.
4. The RLO has worked hard to build and maintain physical environments that are attractive to academic success and other learning opportunities.
5. Technology advancements and support have been positioned as a priority for the department via purchases of equipment, addition of IT staff and system wiring projects.
6. Recent new construction projects are evidence that the RLO has evaluated the needs of today's college student and utilized innovative design strategies.

Residence Life Programs

A number of areas are covered in the Residence Life program section of the report which include: staffing, safety and security, student conduct, programming, student leadership development, technology, evaluation and assessment of program, dining, policy issues, summer housing/conferences, and student attitudes and perceptions. This section concludes with issues/opportunities and themes.

Observations

The Residence Life Program is held in high regard by students, faculty and staff. The reasons are many:

- The strength, experience and good management practices of leadership for the department were frequently mentioned from all areas of the department and the Division of Student Affairs.
- A genuine sense of pride on the part of the employees in their work serving and educating students.
- Staff morale is generally very high.
- Indications are that students generally appreciate the services and programs provided by the Residence Life staff.
- The Residence Life program is respected, trusted, and perceived as collaborative by those departments they work with outside the department.
 - Ron Brunell is seen as very responsive, proactive, and supportive of campus services that work in a supportive role of Residence Life.
 - There are very effective program-related relationships with key offices on campus.
- The Residence Life program is viewed by others on campus as having an important and visible role in promoting student education and learning.

Staffing

Live-in staff members are knowledgeable and understand the program's goals. Undergraduate students serve in the eight Head Resident positions and the eight Assistant Head Resident positions. Staff orientation and supervision are provided to full time Head Residents, Assistant Head Residents, and for Resident Assistants to assist in the accomplishment of their jobs. Head Residents and AHR's are extremely committed to doing a good job, and providing services to students. HR's and AHR's feel that there is a great deal of support and two-way communication with Ron Brunell. The 67 Resident Assistants are generally upper class students with a ratio of one RA for every 32 students. RA's have a working knowledge of housing policies and

procedure, in part as a result of the departmental policies and procedures manual. Staff members recognize their limitations and make appropriate referrals when necessary. All 83 live-in staff positions have position descriptions and are evaluated on an annual basis.

There is an adequate number of administrative support staff to assure that the HR, AHR and RA staff are supported and can carry out their responsibilities. Administrative support staff indicated that improved computer hardware would help them be more productive. All staff members strive to create positive relationships with students living in residence halls and apartments. There currently is no formal meeting between the building custodial, maintenance, office clerical staff, and Head Resident for communication purposes. Consideration should be given to developing a “management team” concept for each building. A management team would consist of the Resident Director, the building custodial supervisor, the building maintenance staff member, the building administrative support staff member, and would meet weekly to communicate with each other regarding issues and concerns.

There is a strong focus of staff training and development with an emphasis on campus issues. The staff training program prior to fall opening for live-in staff is especially strong and comprehensive. (Appendix E) Staff members receive training to provide a working knowledge of relevant policies and procedures, and their relationship to the department’s mission and goals. Staff members from other student affairs offices on campus are involved and find the training experience to be positive and helpful. RA’s, HR’s and AHR’s report a sense of confidence and preparedness as a result of the training at the beginning of the year.

Additionally, consideration should be given to a staff development plan that includes increased exposure and exchange with other campuses, and includes support for participation at regional and national conferences. With so few professional staff consideration should be given to a program of cross-training.

Staff compensation for RA’s, HR’s and AHR’s is appropriate considering the positions are filled with undergraduate students.

- Resident Assistants - All RA’s receive the most expensive room plan and the most expensive meal plan, then depending on the residence hall in which each staff member resides the difference is calculated and the RA receives the difference in a cash stipend. Returning RAs receive an additional \$250 each year.
- Head Residents and Assistant Head Residents – All new HR’s and AHR’s receive \$12,000 and \$11,500 respectively, while those HR’s who return their position receive an additional \$500 for the year.

It would be appropriate in the next year for the RLO staff to initiate an ongoing evaluation of the conditions of employment for all staff, to include length of contract, work and living conditions, job expectations and compensation levels. Given the recruitment goals of the university and the recommendations of the Farnum Report it would be a strategic goal to review staffing patterns to:

- Determine if there are sufficient number of professional staff members present to carry out the mission of the department
- Review the pro's and con's of full-time Resident Directors vs. undergraduate RD's
- Involve the university Human Resources department in the review of the RA position
- Review salary and benefits for all full-time Residence Life staff to determine if they are commensurate with similar positions in Montana and the Rocky Mountain region.

Safety and Security

Safety and security policies and procedures are reviewed periodically and modified on a regular basis. Staff members are provided good training and supervision with regard to safety and security policies and procedures. While RA's indicated that the training they received on safety and security issues was adequate they would like even more training in the area related to fire and life safety. Students express strong positive feelings about living on campus regarding Resident Assistants, residence hall safety, residence hall policies and procedures. All residence halls are equipped with sprinklers, smoke alarms, and are in compliance with Missoula building safety codes. There is a good and positive relationship with the campus Public Safety Office and the local Fire Department – this positive relationship is due, in part, to the collaborative approach taken by Ron Brunell. Additionally, Ron Brunell has his EMT certification and drives an ambulance for the local Emergency Services staff which has helped in furthering the development of a strong relationship with outside agencies.

Safety and security are high priorities for the RLO staff. Policies are clear and consistently enforced at all staffing levels. Physical safety improvements are continually made. Weapon storage is provided in four residence halls and checked out at the front desk. The RLO staff should explore options for storage of student weapons that reduce and better manage the risk to the Residence Life program. Many campuses provide a centralized weapon storage at the Campus Police department with access for weapon check-out seven days a week, 24 hours a day.

Student Conduct

Student behavior issues are dealt with effectively by front line staff and at a higher level by Ron Brunell in student conduct hearings. Ron is very effective in this role and is able to make a positive difference in the lives of students and with the student residential communities. It is rare and unusual for a Director of Housing of a system this large to be in a role as hearing officer. Consideration should be given to a review of the student conduct process when Ron retires.

Residence Life staff members receive thorough training in this area of student conduct and have a clear understanding of their role, when to seek assistance, and when to make a referral. Students report being treated fairly and consistently by the Residence Life staff and indicate that the RA's are genuinely concerned about them "as people". Other offices on campus mentioned their positive relationships with Residence Life in working collaboratively with student behavior

issues. Student Affairs staff members felt included, consulted, and involved in helping to make decisions to produce the best outcome for the student and the campus community.

Programming

There is clear evidence that the department makes a systematic effort to maintain effective working relationships with campus and community agencies whose operations are relevant to the mission and goals of the department. The RLO has especially strong relationships with the Curry Health Center, the Public Safety Office, and Alcohol Education. The Directors of the Health Center and the Self Over Substance (SOS) Program mentioned having particularly good communication with Ron and Rita, and the staff from Health Promotions and the Student Assault Resources Center (SARC) indicated that Ron and the RLO staff create a safe environment, that Ron is very responsive to sexual assault victims, and that the training for RA's continues to improve each year.

Programming relationships are also strong with the following offices: American Indian Student Services, Disability Services for Students (DSS). The Director of DSS indicated that there is strong support for mental and emotional health issues, and for companion animal requests. He also indicated that he would like to see better communication of information for students related to accessibility issues. There is a prevailing opinion on campus that housing needs for students with disabilities will only increase. The Director of American Indian Student Services cited a good staff orientation program, regular staff contact, and good sharing of communication as strengths of the collaborative relationship. There was a general view that there could be more cultural events in the residence halls.

The residential learning environment provides educational opportunities for students that are oriented toward promoting academic success. Examples include the Honors Program, and the International student program. The Directors of these two programs emphasized Ron's patience and leadership in working collaboratively with academic programs. The Director of the Honors Program indicated how impressed he was with the staff training. The Dean of the College of Arts and Sciences indicated that although "the university has more priorities than resources" there has been good responsiveness from Housing and that Ron "finds solutions". The RLO also works collaboratively to support the First-year Interest Groups, the Freshmen Seminar, and the University Transition program. Consideration should be given to additional living options and academic interest floors/groupings tied to the academic mission of the university, as well as exploring and encouraging increased faculty involvement in residential programs.

There is a tremendous opportunity for programs and activities in the apartments. Programming in the areas of family issues and cross cultural communication would meet resident's needs. The RLO has helped promote a strong child care program in the apartments. The child care program continues to make a significant positive contribution as a service which will be in high demand for the foreseeable future.

With the arrival of a new Provost an opportunity exists to build on the current positive academic relationships and create new collaborative relationships. Possibilities mentioned related to academic advising in the residence halls, the development of a "language house", and the

potential for “live-in faculty”. The Provost understands that Housing plays an important and visible role in the success of students and views Housing as a “solid partner”.

Areas of programmatic opportunity exist in the universities goal of recruiting more non-resident students, more international students, and more graduate students.

Student Leadership Development

Undergraduate students who have strong leadership and interpersonal skill typically become RA’s, AHR’s and Head Resident Directors. Employment opportunities are also provided for students as student custodians, Resident Technology Assistants (RTA), office assistants, and lab monitors. As a result there are few formal opportunities for student leaders to work with a Residence Hall Association. Opportunities exist to develop new leadership opportunities for undergraduate students through the development of a Residence Hall Association and stronger hall councils. Consideration should be given to assisting students in their leadership development through leadership development programs and classes, and sponsoring student leader attendance at regional and national leadership conferences (e.g. IACURH, NACURH).

Technology

All residence halls, as well as Lewis and Clark, are fully wired. University Villages are not fully wired, although the RLO has been piloting a “wireless” approach in Craighead for the past year. Usage of the wireless access has been monitored by the RLO technology staff and has been low, which may be attributable to the student population living in Craighead.

Each residence hall, as well as Lewis and Clark, has a Resident Technology Assistant (RTA) to assist students. There are 11 RTA’s and 2 RTA Coordinators. RTA’s provide support and service to residents of their assigned building. RTA’s split their time between the Direct Connect office, being on-call, and working in their residence hall, which amounts to approximately 24 hours a week. The Direct Connect Office also is the primary technology support group for all offices within the Division of Student Affairs.

Student opting to pay for service to their room pay a technology fee of \$160 per academic year. This past year residence hall student users have been “separated” from the rest of the university to correct a bandwidth problem and speed up the network. Approximately 80-85% of residence hall students pay the technology fee. As the percentage of students grows higher the RLO may want to consider rolling the technology fee into the residence hall room rate.

Evaluation and Assessment of Program

There is a strong emphasis on regular qualitative assessment. The Residence Life leadership has an excellent record of listening to and understanding students and staff. Focus groups are regularly conducted on a variety of issues to determine student attitudes and perceptions. The Residence Life program has a better understanding of their students needs through their qualitative assessment processes than many housing department have through their quantitative assessment processes.

Assessment and evaluation are utilized in staff training and development, and a quantitative assessment of student satisfaction is conducted on an annual basis with University Village tenants to determine programmatic effectiveness. The RLO staff should consider developing a comprehensive and systematic assessment program with particular emphasis on an annual department assessment to determine student learning outcomes. To assist with this type of assessment the Council on the Advancement of Standards (CAS) provides an excellent guide through their publication titled a Framework for Assessing Learning and Development Outcomes.

Dining

University Dining Services is highly involved in educational programming and contributes to resident satisfaction and student learning. Dining meal options are clear, affordable and responsive to student needs. The variety of restaurants (Bear Claw Bakery, BizBuzz, Cascade Country Store, The Food Zoo, Jus Chillin, La Peak, Think Tank, and the UC Food Court), the “Family Favorite Recipe” program, the “UM Farm to College program”, are all examples of the responsiveness of the Dining staff to student and local community needs. Dining Services offers a number of special events for students including an annual Christmas Cookie Cook-Off. Dining Services continues to explore and initiate new programs to assist the Housing program. Resident Assistants, HR’s and AHD’s report having a strong programmatic relationship with the Dining operation. Student satisfaction with Dining Services is high, which contributes to the overall success of the residential experience.

Policy issues

Contract: There is a clear and thorough written agreement between residents and the department/institution. The procedures for obtaining housing and meal plan options are clearly communicated to on-campus students. Additionally, procedures for room assignment and room changes, as well as canceling the housing and dining agreement are in writing and available to students.

Assignment patterns and accessibility: Many residence hall and apartment facilities are readily accessible to all residential students, although the buildings accessible for students in wheelchairs are generally those residences with higher room rates. Consideration should be given to providing students with mobility impairment, who need live in a residence hall with a higher room rate, a room at the standard residence hall rate.

Residence Life Scholarships: The Residence Life Scholarships appear to be a strategy that is working, and have contributed to the recruitment and retention of students to the Housing program, as well as assisting the university in its enrollment goals. These scholarships have been an important programmatic strategy in assisting students in their transition to college and should be reviewed on an annual basis as residence hall and apartment occupancy fluctuates.

Summer Housing/Conferences

Each summer approximately 150 students live on campus and attend summer school (currently located in Pantzer Hall). It is important for the transition from the academic year to the summer operation, and from summer operation back to the academic year be well-planned with consideration given to all stakeholders. The summer conference program is essential for a variety of reasons and could be expanded. Exposure of the university through youth conferences, recruitment of high school students, supporting the university's academic mission, and providing year-round employment opportunities for staff, are all positive aspects of a strong summer conference program

There is a strong need at the University for guest housing, visiting faculty housing, and small academic conference housing. There also appears to be an opportunity for the development of formal university representation on the Missoula community Convention and Visitors Bureau. The opportunity exists for campus conference coordination and event planning to be centrally coordinated to develop a "one-stop shopping" point of contact for campus faculty and staff, and external constituents.

Student Attitudes and Perceptions

Throughout the two site visits the PRT's interactions with individual students and with student groups were very positive. Students who lived in campus housing felt that they were "not just a number" and received quality personal attention. Students commented very positively regarding the residence hall staff, especially the custodial staff, and the RA's, who they felt were very friendly and provided numerous activities, and were at an appropriate age to relate to and understand students. Students felt very safe on campus. Students commented that the RA staff were more concerned about student safety rather than "getting students in trouble", and observed that the presence of the Public Safety Officer staff was very comforting. Student felt that the weekend custodial service in the residence halls could be improved. Students indicated that the food service was "fabulous" and better than they expected.

The general perception of students about their housing experience was that it is safe and convenient, and the staff takes a personal interest in them.

Issues / Opportunities

There is an opportunity for the development of an Off-campus Student Services program, as well as a Community Liaison position. As the potential for an increase in graduate student and international student enrollment grows, and with increased pressure on the off-campus housing market, it will be important for more attention to be paid to town/gown relationships.

There is an opportunity to initiate discussion on the University Parking policy to develop a parking plan that provides an advantage to residence hall students for parking lots adjacent to residence halls.

There is support for the idea that the informal group in which Ron participates, that deals with campus crisis situations, should be formalized.

Themes

1. Students, faculty and staff generally feel positive about the Residence Life program. The program is respected and trusted by members across the campus, and perceived as inclusive and collaborative.
2. Students are appreciative of and satisfied with the services and programs offered, and with the educational and student-oriented approach taken by the Residence Life staff.
3. Live-in staff is a committed group of undergraduate students who have undergone a rigorous selection and training process and who are committed to helping students transition to college.
4. The Residence Life program stays current with campus safety and security issues and continually improves its policies, procedures and facilities.
5. The Residence Life staff is responsive to student conduct issues and will need to review its processes with Ron's upcoming retirement.
6. Programming has been conducted with strong positive collaborations with academic and administrative units, and with the support of the Provost a new set of collaborative arrangements with academic departments is possible.
7. The Residence Life staff works hard to listen to and understand staff and student concerns. There is need to establish an annual assessment of student learning outcomes.
8. Residence Life technology staff continually work to keep the RLO and student residences current with existing software and hardware.
9. The Residence Life program relationship with Dining is strong, positive and mutually supportive.

Human Resources/Staffing

Observations

The University of Montana Residence Life is somewhat unusual in that they have maintained a constant senior leadership team in Ron Brunell and Rita Tucker for many years. As a result, historical perspective and personal commitments have played an important role in developing the Residence Life Program over the past thirty plus years. The consulting team found in this leadership team a strong commitment to link the importance of running a multi million dollar business with values of support for student learning and success. Campus senior leadership appreciated this ability and described many scenarios that provided evidence of this. The Residence Life Office is held in high esteem by other campus offices and viewed as a true partner in the recruitment and retention of students. The RLO leadership has articulated a strong vision for the operation that are consistent with the August 2004 Division of Student Affairs Strategic Plan drafted by Vice President for Student Affairs, Teresa Branch. It was obvious to the Consulting Team that the RLO is effectively positioned to address the seven Goals and Objectives outlined in the Plan.

Organizational Health

This area is difficult to assess, but can be measured on the following dimensions: Staffing levels; performance reviews; training and professional development; employee morale; salary levels; reporting structures and effective job descriptions.

The organization is very lean and operating with a minimal number of full-time employees. The reliance of undergraduate employees at the Supervisory Staff level contributes to this issue. Student staff is utilized throughout the organization and represent a significant portion (\$1.5M) of the overall payroll. Ron and Rita are very visible leaders within the operation and this management style tends to mask organizational concerns that might evolve without this approach. The organization is perceived as “family” and an open door policy by Ron and Rita contributes to employees viewing them as accessible and caring. This perception varies by area with the Supervisory Staff viewing this approach as successful and the Operations Staff sharing some concerns.

The Consulting team found that plans were being made to update job descriptions and perform regular performance evaluations. Training and staff development efforts appeared to be centered on the Supervisory and Secretarial Staff level, with less attention paid to Operations Personnel. It should be noted here, that since the last review in 1999, Ron and Rita have worked hard to implement strategic initiatives (contact teams, planning meetings, and supervisor training) that have addressed a more inclusive department wide effort for staff development.

Salary levels for full-time staff appear to be slightly lower than comparative positions in our industry. This may be a result of wage negotiation practices and the Missoula employment market. Student/staff positions appear to be paid fairly and equitably. For the most part, staff retention is not a critical issue

Overall, employee morale seemed good with a number of staff who transferred to housing indicating how supportive the RLO was compared to their former campus work environments. Also noted was the high number of staff hired and promoted from within the organization. This can have both negative and positive implications. It was interesting to learn that the Human Resource Office at the University perceives the RLO as the working model for successful personnel operations on the campus.

Staff Communication and Decision Making

The goal of the Residence Life Office is to communicate values, goals and decisions in an effective manner within a department that is one of the largest on campus. The diversity of positions within the organization makes this a significant challenge. Key positions related to this objective are the following: Administrative Office Manager; Assistant Director-Information Technology; Assistant Director-Maintenance and Custodial Manager in addition to the Associate Director's role with the supervisory and Village staff. The Review Team found significant differences among supervisors in accomplishing these goals. As a result, certain staff felt less informed and not included in the decision making process. It appears to the PRT that the RLO is making significant strides in improving internal communication strategies. As an example, the RLO has initiated a Departmental Newsletter in an effort to improve communication with all staff. Also to be considered is the opportunity to cross-train staff at various levels of the operation.

It was obvious to the PRT that the Department has a track record that supports a solid history of good management decisions. This is documented in reports and assessments that indicate both fiscal and programmatic successes.

Campus Relationships

A significant strength of Residence Life is its effective positioning in supporting student success on campus. The leadership of the RLO emphasizes good communications and strategic alliances with many departments on campus. The Review Team heard many positive comments from campus constituents related to effective outreach, trust and respect for the RLO Department. The RLO is definitely viewed as a catalyst for impacting the lives of students in many important ways. In addition, the RLO is perceived as eager to partner with other agencies and academic programs on a variety of campus initiatives.

The University of Montana is strongly committed to increasing diversity in the student body and workforce. The RLO has embraced this goal via institutional programs and hiring practices.

Potential Leadership Change

Ron Brunell has indicated that within the next year he plans to retire. In many ways, the growth and success of the RLO is directly attributable to Ron's commitment and leadership. While the PRT felt it was inappropriate to discuss specifics, there are some general principals and recommendations that apply in looking to replace Ron.

Recommendations

1. Develop an understanding of what leadership skills will be necessary to guide the RLO into the next decade.
2. Understand what strategic planning initiatives will be given priority by the department and Vice President Branch.
3. Understand and respond to the financial contributions and growth initiatives that are expected by the University administration.
4. Describe the current culture of the RLO and how receptive the staff is to change initiatives.
5. Discuss strengths and weaknesses of the RLO and in that context create a focus group made up of key faculty, administrators, students and RLO staff to help redefine the position of Director. This may also be a good time to review supervisory relationships and reporting structures inside the department and within the Division of Student Affairs.

Final Remarks

The Peer Review Team felt it was a privilege to conduct this consultation for The University of Montana's Residence Life. The team commends the staff for their openness and willingness to share both facts and opinions related to the operation. Although we had the opportunity to meet with a wide diversity of campus staff and students, it became quickly apparent that in our two site visits we received only a snapshot of the Residence Life operation. As outsiders, we lacked the understanding of history and cultural/leadership changes that played an important role in shaping policy, programs and decision- making.

That being the case, we commend the RLO for their willingness to conduct a review of this nature. The hospitality, honesty and responsiveness of the faculty, staff and students we met with allowed us make the observations reflected in this report. A special thank you goes to both Ron Brunell and Rita Tucker who led and facilitated this effort on behalf of the University of Montana.

The themes outlined within the four major chapters provide an overview summary for this review. There is both implicit and explicit dialogue in each section that validates existing practice or recommends further study and change. Our sense is that these observations will be taken seriously and will serve to facilitate important dialogue within the leadership team of the Residence Life Office. The PRT was duly impressed with the responses by the RLO to the 1999 Review and hope this current report will continue to help shape future action/decisions. This current review should also be utilized to help tell the "Residence Life Story" at the University of Montana. Where the Department has been managed effectively by balancing an "ethic of care" for students with a strong concern for good fiscal practices, this will become increasingly more difficult. Institutional needs, enrollment practices, changing demographics, aging facilities and higher demands on auxiliary funded operations will all impact future success.

The members of the Peer Review Team welcome any thoughts, observations or questions regarding this report.