



**The University of Montana**  
**Department of Intercollegiate Athletics**  
**Five Year Strategic Plan**  
**2007-2011**



May 9, 2007

The following UM Athletic Department Strategic Plan addresses the what, why, how, when and where aspects of athletics at The University of Montana. It is the intent of this document to explain our current position as we see ourselves in the world of intercollegiate athletics. Even more, this plan is created to provide and extend direction, purpose, methodology and motivation to the UM Athletic Department for years 2007-2011.

Planning will prepare the UM Athletic Department for change, even make us comfortable with change and adaptive behaviors. If an organization is not prepared for the change, it will be engulfed by it. If an organization is prepared for change it will be propelled forward by it. The intense competition for the entertainment dollar in our economy and the complex nature of growth in our business require a fleet-footed, responsive athletics organization—one which anticipates change well, one which continuously improves customer service to both internal and external customers, and one that skillfully builds on its strengths as an organization. A good, well-thought out plan will provide us the tools to be prepared for the future and whatever changes it will bring.

Thus began the process to develop the first ever UM Athletic Department strategic plan. While it has been a longer process than anticipated, the outcome was more positive than we expected and has produced a document of which every participant is proud.

## **History of the UM Athletic Department Strategic Plan**

The process for developing the UM Athletic strategic plan involved two planning groups: the core working group and the Athletic Strategic Planning Committee (ASPC). The core working group is the smaller group that did the bulk of the planning based on valuable input from the larger ASPC. On December 29, 2005, the core working group held its first meeting. This small group consisted of administrators from the Athletic Department, Main Hall and members of the NABGA strategic planning committee (see Appendix I-bolded names). During this work session, the membership of the larger Strategic Planning Committee was decided as well as the steps of the process.

The larger Strategic Planning Committee included representation from the following groups: Athletics, Faculty Senate, Chamber of Commerce, GSA, Student Government, Foundation, Adams Center, Campus Community, coaches, student-athletes, general Missoula community, and NABGA. The roster of those who contributed their valuable time, energy and ideas is attached to this plan as Appendix I. Over the course of several meetings, valuable input was gathered that served as the basis for the mission, vision, values and strategic goals for the department.

From this point, the core working group participated in a half-day session developing and prioritizing the tasks for each strategic goal. Finally, administrators within the Athletic Department determined some of the operational strategies necessary to achieve the tasks and the timeline to begin tackling the strategic goals. That brings us to today.

The Operational Plan, which is the internal document that will include budget numbers, will be developed by the Athletic Department and shared with the President.

By involving the number and type of people we did with the ASPC, we strongly believe we achieved the President's primary directive of getting buy-in from the varied audiences of UM Athletics. The feedback we received from this group was incredibly positive and appreciative of being involved in the planning. We believe we have finally earned the trust back from a wide variety of groups and can move forward with their support.

## **Environmental Analysis**

The department is committed to continuously monitoring and analyzing the environment in which it functions. In doing so we will understand the trends and issues of the environment that affect our present operations and outcomes and also understand the future conditions with which we must deal as an organization. We will monitor such issues as the following, in designing and executing our strategic plan:

- A. Economic issues that relate to the economies of the institution, the area, state, and region in which the program functions. The economic conditions naturally have a significant effect on donor behaviors and ticket-buying levels.
- B. Demographic issues related to the population we serve and our target markets.
- C. Conference issues such as revenue sharing trends and conference realignment.
- D. Federal issues (such as the interpretation of compliance with Title IX), present conditions, future trends.
- E. NCAA and institutional issues and rules that could influence how the department functions and how we use our resources.
- F. The status of the Football Championship Subdivision (formerly IAA) and its weakening as more and more teams move up.
- G. Conditions of our own institutional setting such as admissions requirements, tuition increases, graduation requirements, and others.
- H. Other external environment factors.

Most importantly, the department looked at internal operational factors that directly affect the ability of the program to achieve its mission and goals. Listed below are the key strengths and weaknesses for each of the following operational sectors of the university and athletic department:

## 1. Management and Planning Systems

### Strengths

- Competent energetic personnel
- Varied backgrounds and breadth of experience within the administration
- Efficient operations in spite of limited resources
- Ability to offer multi-year contracts to head coaches
- Have regained the trust of the public and University administration

### Weaknesses

- Lack of firm plans and goals
- Additional staff needed in compliance, equipment room, training room and events management
- Restrictive office space
- Not controlling athletic ticketing hinders the ability to generate additional revenue from ticket sales

## 2. Financial Resources

### Strengths

- Will pay off the deficit ahead of schedule
- New revenue from football and basketball program ad sales
- Steady interest from public in giving opportunities, corporate sponsorships, season tickets
- Solid university financial support for student-athlete scholarships (58%) and personnel salaries (62%)
- Suite lease renewals with new revenue
- Stadium expansion plan that includes new revenue from club seating opportunities

- North End Zone revenue committed to Athletic Department operational budget
- Potential tuition increase freeze proposed by the Governor
- Coaches' ability to run private camps (avenue for increased funds to coach salaries and sports programs)

#### Weaknesses

- Funds are needed for additional personnel, recruiting, equipment, travel, and salaries
- Athletic department does not retain collegiate licensing funds or concession sales
- Department pays rent for the use of the Adams Center
- Lack of ability to build contingency reserve
- Difficulty with competition scheduling—limited opportunities to negotiate high figure guarantees and/or attracting quality opponents to our venue

### 3. Operations, Services, and Facility Resources

#### Strengths

- Best football show in IAA
- One of the best football stadiums in IAA
- Excellent Hall of Champions
- Solid support from administration
- Able to accomplish more with fewer personnel
- New basketball floor
- Quality personnel
- Excellent student-athlete experience, both on the field of competition and in the classroom

### Weaknesses

- Shameful condition of men's locker room
- Need for indoor practice facilities
- Lack of meeting space
- Inadequate space for academic center
- Under-funded budget for repair and maintenance of all facilities
- Limited space in weight room
- Need for more office space
- Aging weight equipment
- Constant conflicts with use of Adams Center facilities (arena, WAG, EAG, Sky Club)
- Not controlling ticket office directly impacts the public's view of the Athletic Department and our attention to customer service



## **Assumptions**

The following are the major assumptions upon which the athletic department has based its strategic plan:

1. University support of the Athletic budget of no more than 5% of the University's total budget.
2. Athletically-generated revenue will remain with Athletics (club seating, North End Zone revenue, program ads).
3. NCAA scholarship limitations and budget requirements will remain the same.
4. Remain a member of the Big Sky Conference.
5. Title IX will remain in effect.
6. Athletic programs will remain competitive.
7. Athletic program image with University administration, in the community and with the Board of Regents will continue to improve.
8. Student support of the program will continue to improve.

## Values

**Integrity:**

Grizzly Athletics will exhibit integrity everywhere we go and in everything we do.

**Excellence:**

Grizzly Athletics will demonstrate excellence in every thing we do.

**Loyalty:**

Grizzly Athletics will demonstrate loyalty to our University, our state, our teams, and fans.

In order to understand where we are and where we want to be, it is vital to define those qualities that we hold sacrosanct. In understanding those values, the goals and path to achieve those goals will be clearly set out before us. Every decision of the department will reflect these defined values.

What qualities make a national championship team? What traits does a successful graduate possess? What makes Montana "*Montana*"? In answering these questions, we have defined who we are.

## Mission Statement

***In supporting and promoting The University of Montana mission, Grizzly Athletics retains the trust and respect of alumni, fans and the State of Montana by graduating student-athletes, striving for excellence and competing with integrity.***

The University of Montana is a member of the Big Sky Conference and affiliated with Division I of the National Collegiate Athletic Association (NCAA). Our purpose is to provide a sound, competitive intercollegiate athletics program that represents the University in an impeccable manner, and provides student-athletes the opportunity to develop physically, mentally, ethically, and socially. In doing so, the athletic program will provide: (1) coaching of the finest quality, (2) facilities that provide excellent venues for safe and high-caliber competition, (3) academic assistance to enhance academic success, (4) customer service that is consistently excellent, and (5) incentives and initiatives to retain quality coaches, employees and student-athletes. Our main objective is to assist young men and women in their educational pursuits to the fullest through support, guidance and motivational programs. This assistance is intended to provide maximum opportunity for student-athletes to reach their full potential. The University is committed to a philosophy of excellence and our Athletic Department mirrors this sentiment.

It is the goal of the Athletic Department to serve and direct student-athletes along a path that combines their educational pursuits along with athletic participation. The function of the Athletic Department is to work closely with the UM campus community, alumni, friends of the University, and the greater surrounding community to achieve our mission. A healthy working relationship with the NCAA and the Big Sky Conference is also part of the responsibility Intercollegiate Athletics must effectively and continuously pursue.

## **Vision Statement**

***To be a model program excelling in academics and athletics***

Our expectation as a department is to reach the highest level of success in all NCAA measures in each sport program. Striving to win the Big Sky All-Sports President's Trophy recognizing the overall positive production of our total program reflects upon the quality of athletes, coaching and resources provided.

As stated previously in the mission statement, success for our Athletic Department means excellence both on the athletic field and in the classroom. Therefore, UM's vision is to be among the top institutions in athletic achievement as well as in NCAA academic measures such as student-athlete graduation rate, the Academic Progress Rate (APR) and the Graduation Success Rate (GSR).

## **Strategic Goals**

### **Academics**

Assist and encourage Grizzly student-athletes to reach their full academic potential.

### **Financial**

Achieve fiscal success and accountability.

### **Student-Athlete Welfare**

Provide each student-athlete with the opportunity to grow personally and enjoy a positive experience at The University of Montana and within the community.

### **Sportsmanship**

On and off the field of competition our staff, athletes and fans will respect the sport, themselves and others.

### **Winning**

Provide the facilities, coaches and resources necessary to continue the Grizzly winning tradition.

### **Diversity**

Provide opportunities for individuals on the basis of merit in a non-discriminatory manner.

### **Equity**

Provide appropriate facilities and resources equitably without regard to gender.

### **Advocacy**

Engage the University and Montana communities, Grizzly fans, former athletes and University alumni in the mission and accomplishments of Grizzly Athletics.

### **University Relations**

Engage the University community as a full partner in furthering the Mission of the University of Montana for the benefit of all Students, Faculty, and Staff.

The Department's Strategic Goals reflect the idealism of those involved directly and indirectly with program results. They also represent the key elements of a successful program as viewed from high and theoretical levels – they are “strategic” not “operational”. They are not likely to change much year to year and if properly targeted operationally (one bi-annium at a time and one task or project at a time), they will produce superior outcomes and result in a highly successful

athletic department that is in harmony with its environment (The University of Montana, the City of Missoula, and the State of Montana). The significant challenge in linking the Department's Strategic Goals to successful Operational Outcomes is recognizing that the desired operational outcomes are tied primarily to ever-changing uncontrollable factors such as availability of resources and adequate personnel to assist in achieving goals.

## **Operational Strategies**

Our first step into the operational side of the Department's planning process requires the development of an awareness of our challenges, built-in environmental constraints and environmental advantages. To maintain the current status of domination in our sports programs and continue our tradition of excellence, the department must find new sources of funding. Thus we need to obtain or generate more revenue which is a major basis for progress. It also means careful management and cultivation of our current assets.

At a minimum, cost of living increases must be built into the yearly growth and development enabling our individual sports programs to remain healthy and stable. In some cases, increased funding is required to provide acceleration for likely achievement for a given segment of the Athletic Department mission.

Focus upon specific prioritized needs is critical for fluid operational procedure allowing for the potential of individual sports programs to surface and shine. To clarify UM strategies, the following approaches are presented:

- a. Target needs and review yearly priorities
- b. Develop and expand fundraising activities to meet budgetary needs
- c. Continuously motivate all segments of athletic family
- d. Work at scheduling opponents on common sense basis
- e. Evaluation of each and every Athletic Department component yearly
- f. Think creatively for untapped sources of revenue
- g. Motivate constituents

## **Evaluation Process**

An integral part of any strategic and operational plan is the process by which its validity is evaluated. A strategic plan is fluid and must be evaluated yearly to adjust as external and internal factors influence it. Progress towards goals must be measured and each member of the athletic department held accountable for their participation in department-wide objectives.

Yearly, the head of each unit will review with each responsible employee the progress that has been made toward meeting the objectives within the unit, while the senior staff will meet yearly with unit heads to review their progress and to analyze the progress toward meeting the objectives within the plan.

Yearly employee evaluations will be at least partially based on the individual's performance in effectively and efficiently executing the strategies needed to meet the objectives for which he or she is responsible (see Appendix II). In some cases where it has become clear that the objectives were not realistic, some adjustments may be in order.

While the plan will be reviewed each year and minor changes made, at the end of the original strategic plan time frame (5 years), a comprehensive post-process review will be carried out by the department and a new planning process will occur for the next five years.



## Tasks, Timeline, and Costs

As UM Athletics moves forward and looks ahead to the next five years, there are three major areas of focus for strategic planning purposes: facilities, student-athlete support (academic and welfare), and competitive issues. A majority of the projects identified in the departmental strategic plan fall within these areas. While there were other strategic goals identified and are included in this document, these three are the highest priority. Finally, several of the identified projects cross over several of these areas.

Facilities: A project that is currently under way and will provide much needed revenue is the 2,000 seat stadium expansion on the east side. As is the national trend, this project will give us the opportunity to offer club seating and associated amenities. We anticipate selling all of those seats before the project is even completed. This additional revenue will assist with the next priority: the office complex project. Depending on the ultimate final design and location, this project will touch on many areas of concern including a new men's locker room, a larger, more efficient weight room, a larger academic center, a new student-athlete study lounge, and providing more office space for future growth. Another major project that appears under several strategic goals is an indoor practice facility. The availability of such a facility would benefit many of the sports within the department and address several problems including tennis practice during the winter and the availability of an indoor track. Finally, the football turf will need to be replaced within the next 3 years, according to life span projected by Sprinturf officials.

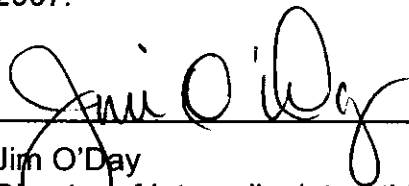
Student-Athlete Support: The most urgent need within this area is scholarship funding. This includes fully funding current scholarships and providing a stable source of scholarship funds for degree completion and summer school. GrizScape, which offers sports enhancement counseling and support, is currently a year-to-year partially funded program. Providing full funding would greatly

enhance this program. Being able to hire additional staff in the Academic Services area is an identified goal for the department. Finally, being able to purchase an X-Ray machine for the Rhinehart Athletic Training Center would greatly enhance their service to the student-athletes.

Competitive Issues: The identified needs in this area include raising coaching salaries to be on par with peer institutions, incentives, multi-year contracts, increased recruiting budgets, and updated equipment in the weight room. Many of these projects lead to the intangible strategic goals within the plan including coach/staff/student-athlete retention, competitive edge in recruiting, and the continuation of winning tradition.

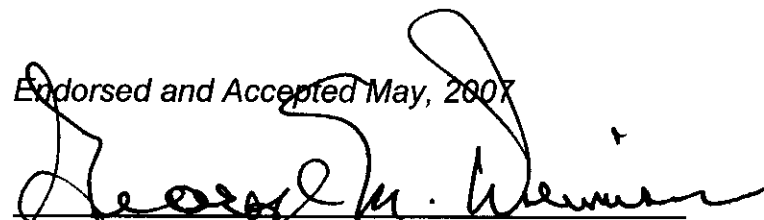
This summary serves as a “snapshot” of the attached master strategic matrix. The full matrix includes timelines, cost and other goals the department will strive to achieve within the next five years.

*Adopted by The University of Montana Department of Intercollegiate Athletics and the ASPC as the Strategic Plan for the Department effective January 1, 2007.*



Jim O'Day  
Director of Intercollegiate Athletics  
The University of Montana

*Endorsed and Accepted May, 2007*



George M. Dennison  
President  
The University of Montana