The University Center (UC) at The University of Montana conducted a self-assessment of its program during 2009 and 2010 using the standards and guidelines for the college union established by the Council for the Advancement of Standards (CAS) in Higher Education (2003, sixth edition). As part of the review process, the University Center brought in two external reviewers to also assess the program and validate the self-study results. The external review team of Carlos García and Michael Ellis visited The University of Montana campus from March 14–16, 2010. They concluded that the University Center is well-positioned in leadership, student affairs philosophy, and programming to take the University Center and its mission into the future. The external review team recommends that the overall assessment of the University Center relative to the CAS College Union Standard should be closer to a well met score than the minimally met score, as concluded by the internal review committee.

The University Center strives for full and equal participation in all facilities, services, programs, and events. For more information or to request disability related modifications, please contact me.

Liz Roosa Millar, Ph.D.
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2010
Introduction and Background

In 2003 the Vice President for Student Affairs, Dr. Teresa Branch, charged the departments within the Division of Student Affairs to undergo an internal and external program review every 5-7 years. This report contains the results of the first comprehensive program review for the University Center (UC) of The University of Montana. The results of this assessment will be used to inform the University Center’s 2010 – 2015 Strategic Plan, which will follow the 2002 – 2007 version. The UC began the internal review process in the spring of 2008 and concluded the external assessment phase in spring 2010. The 2010 – 2015 Strategic Plan will be completed by fall 2010. This report presents the results of the program review and abbreviated details of the process; a comprehensive report is available upon request.

The Council for the Advancement of Standards in Higher Education (CAS) College Union Standards and Guidelines (6th Edition, 2003 College Union Standard, CD Version 3.0) provided professional benchmarks for judging the performance of the University Center. The following presents the standards and details of the assessment process outlined in the CAS Self-Assessment Guide (SAG) for the College Union and pertinent documentation specific to the UC’s program review.

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PROcedures

The UC followed the procedures outlined in the Self-Assessment Guide (SAG), which translates the CAS College Union Standards and Guidelines into a format enabling self-assessment. The purpose of the self-assessment was to use this guide to gain informed perspectives on the strengths and deficiencies of services and programs and to plan for improvements. Grounded in the self-regulation approach to quality assurance in higher education endorsed by CAS, the SAG provided
the UC a tool to assess programs and services using current generally accepted standards of practice. CAS standards and guidelines are organized into thirteen components:

Part 1. Mission
Part 2. Program
Part 3. Leadership
Part 4. Organization and Management
Part 5. Human Resources
Part 6. Financial Resources
Part 7. Facilities, Technology, and Equipment
Part 8. Legal Responsibilities
Part 9. Equity and Access
Part 10. Campus and External Relations
Part 11. Diversity
Part 12. Ethics
Part 13. Assessment and Evaluation

CAS self-assessment and external review procedures involved several steps including:

1. Establishing the self-study process and review team
2. Understanding the CAS Standards and Guidelines and the Self-Assessment Guide
3. Compiling and reviewing documentary evidence
4. Judging performance
5. Completing the internal/self-assessment process
6. Completing the external/peer-review process
7. Disseminating the program review results
8. Formulating an action/strategic plan

Step One: Establish and Prepare the Self-Assessment Review Team

Completed June 2008

The first step was to identify an individual to coordinate the assessment process. Liz Roosa Millar, UC Associate Director was selected to perform this task. Once a leader was designated, members of the institutional community (e.g., professional staff members, faculty members, and students) were identified and invited to participate on the University Center Assessment Committee (UCAC).

UNIVERSITY CENTER ASSESSMENT COMMITTEE (UCAC) 2008 – 2010

Convened and began service: June 2008

The UC Assessment Committee (UCAC) comprised individuals primarily from University Center permanent and student employees. However, three representatives from outside the Department were also recruited: a person from another Student Affairs area, a faculty member, and an administrator from outside the Division. Members of the committee were selected in three ways:
1) volunteers were solicited from the entire UC staff; 2) key individuals were selected based on job responsibilities and area oversight and; 3) external members were recommended and/or chosen based on knowledge, interest, and potential to actively contribute as members of the review team.

<table>
<thead>
<tr>
<th>Name</th>
<th>Title and Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adrianne Donald</td>
<td>Assistant Director, UC Marketing &amp; Communications</td>
</tr>
<tr>
<td>Andrea Vernon*</td>
<td>Director, Office for Civic Engagement</td>
</tr>
<tr>
<td>Candy Holt</td>
<td>Director, University Center</td>
</tr>
<tr>
<td>Greg Larson*</td>
<td>Associate Professor, Department of Communication Studies</td>
</tr>
<tr>
<td>Jennifer McMillan</td>
<td>Business Manager, University Center</td>
</tr>
<tr>
<td>Liz Roosa Millar</td>
<td>UCAC Chair and Associate Director, University Center</td>
</tr>
<tr>
<td>Mika Watanabe-Taylor*</td>
<td>Coordinator, Disability Services for Students</td>
</tr>
<tr>
<td>Molly Collins</td>
<td>Assistant Director, UC Student Involvement</td>
</tr>
<tr>
<td>Peter Knox*</td>
<td>Student Supervisor, UC Source Information Desk</td>
</tr>
<tr>
<td>Roger McDonald*</td>
<td>Building Services Assistant, University Center</td>
</tr>
<tr>
<td>Roger Strobel</td>
<td>Assistant Director, UC Building Services</td>
</tr>
<tr>
<td>Shannon Earley</td>
<td>Manager, UM Conference &amp; Events Planning</td>
</tr>
<tr>
<td>Tina Brown*</td>
<td>Student Coordinator, UC Student Involvement/Day of Dialogue</td>
</tr>
<tr>
<td>Tonya Smith</td>
<td>Student Coordinator, UC Special Projects</td>
</tr>
</tbody>
</table>

*For various reasons, these individuals did not participate in the full process; names in **bold** completed the internal review.

Although the attrition of the inaugural UCAC membership was unfortunate, the time commitment necessary to carry out the process properly was unexpectedly quite intensive. Expecting this type of commitment from outside participants, let alone some internal staff members, was neither realistic nor appropriate. The addition of the external review compensated for the minimal outsider perspective during the self-assessment.

Step Two: Understanding the CAS Standards and Guidelines

*Completed September 2008*

Once the UC Assessment Committee (UCAC) was established, the first meeting was held on June 25, 2008. As a group, the review team (UCAC) examined the standards carefully before implementing the study. It was not only desirable for the team to discuss the meaning of each standard, **but** it was also invaluable to establish a shared understanding of the terminology. Through this method, differing interpretations were examined and agreement generally reached about how the standard would be interpreted for purposes of the self-assessment. Deliberate
discussions occurred about how to initiate the rating process and select the optimal rating strategy. In such discussions, disagreements among team members occurred, and resulting clarifications informed all participants. It was important that the team achieve consensual resolution of such differences before proceeding.

Step Three: Compile and Review Documentary Evidence
Completed January 2009

Collecting and documenting evidence of program effectiveness is an important and time intensive step in the assessment process. It is good practice for programs routinely to collect and file relevant data that can be used to document program effectiveness over time.

The UCAC compiled a variety of evidence, which allowed raters to make judgments about the wide-range of program expectations articulated in the standards. Multiple forms of evidence were reviewed and reported in an Evidence ROADMAP which was created to document and manage the copious evidence and to assist in navigating the Web site http://life.umt.edu/ucac where the evidence and the Evidence ROADMAP was accessed, updated, and reviewed electronically during the external review. All evidence and the Evidence ROADMAP was also printed and organized by standard in binders in the UC Administrative Office. The evidence compilation and rating process identified a need to obtain additional information or documentation before proceeding to lend substance to judgments about a given assessment criterion. Support documentation was appended and the final group rating was made inclusive of this evidence.

Step Four: Judging Performance
Completed February 2009

Assessment criterion measures are used to judge how well areas under review meet CAS Standards. These criterion measures are designed to use a 4-point rating scale. In addition to the numerical rating options, Not Rated (NR) and Not Done (ND) ratings are provided. This rating scale is designed to estimate broadly the extent to which a given practice has been performed based on the evidence.

CAS Criterion Measure Rating Scale

<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ND</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>NR</td>
</tr>
<tr>
<td>Not Done</td>
<td>Not Met</td>
<td>Minimally Met</td>
<td>Well Met</td>
<td>Fully Met</td>
<td>Not Rated</td>
</tr>
</tbody>
</table>

UCAC chose to incorporate one additional guideline that resulted in five criterion measures within the Leadership standard. The guideline related to perceptions of Shared Leadership and was added into the rating procedures before the self-assessment process began.

Step Five: Completing the Internal/Self-Assessment Process
Completed internal review March 12, 2009
A two-tiered (individual and group) judgment approach for determining the extent to which the program meets the CAS Standard was utilized. First, the self-assessment team (UCAC) and functional area staff members individually rated each criterion measure using separate copies of the CAS Self-Assessment Guide. Functional area staff members were invited to participate in the individual rating at multiple UC staff meetings. UC staff members were solicited for participation at several staff meetings and via email. This individualized rating procedure was then followed by a collective review and analysis of the individual ratings.

When the individual ratings were reviewed and translated into a collective rating the team began the interpretation phase of the self-assessment. Interpretation incorporated considerable discussion among team members to assure that all aspects of the program were given fair and impartial consideration prior to a final collective judgment (see Appendix I – A: UCAC Internal/Self-Assessment Results).

After the team review was completed Liz Roosa Millar, the UC Associate Director, began the process of coordinating the external review team site visit. Once the internal and external reviews were completed, the results compiled, and the 2010 – 2015 Strategic Planning process formally underway, a meeting with interested administrators, staff members, and student leaders will be scheduled for a general examination of the program review results. The Associate Director will create a presentation and abbreviated materials to disseminate during these informational sessions. These conversations will contribute to the strategic planning phase of the process. Ultimately, this internal and external assessment will provide the benchmarks from which to generate an action plan for strengthening and enhancing the University Center program.
### Table 1. Overall Ratings from UCAC Internal Review

<table>
<thead>
<tr>
<th>Component</th>
<th>Standard</th>
<th>Total</th>
<th>Total Possible</th>
<th>Criterion Measures</th>
<th>Mean</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part 13.</td>
<td>Assessment and Evaluation</td>
<td>7</td>
<td>20</td>
<td>5</td>
<td>1.40</td>
<td>Not Met</td>
</tr>
<tr>
<td>Part 2.</td>
<td>Program</td>
<td>55</td>
<td>104</td>
<td>26</td>
<td>2.12</td>
<td>Minimally Met</td>
</tr>
<tr>
<td>Part 12.</td>
<td>Ethics</td>
<td>27</td>
<td>48</td>
<td>12</td>
<td>2.25</td>
<td>Minimally Met</td>
</tr>
<tr>
<td>Part 8.</td>
<td>Legal Responsibilities</td>
<td>16</td>
<td>24</td>
<td>6</td>
<td>2.67</td>
<td>Minimally Met</td>
</tr>
<tr>
<td>Part 3.</td>
<td>Leadership</td>
<td>66</td>
<td>96</td>
<td>24</td>
<td>2.75</td>
<td>Minimally Met</td>
</tr>
<tr>
<td>Part 7.</td>
<td>Facilities, Technology, &amp; Equipment</td>
<td>9</td>
<td>16</td>
<td>3</td>
<td>3.00</td>
<td>Well Met</td>
</tr>
<tr>
<td>Part 5.</td>
<td>Human Resources</td>
<td>46</td>
<td>60</td>
<td>15</td>
<td>3.07</td>
<td>Well Met</td>
</tr>
<tr>
<td>Part 4.</td>
<td>Organization and Management</td>
<td>22</td>
<td>28</td>
<td>7</td>
<td>3.14</td>
<td>Well Met</td>
</tr>
<tr>
<td>Part 11.</td>
<td>Diversity</td>
<td>13</td>
<td>16</td>
<td>4</td>
<td>3.25</td>
<td>Well Met</td>
</tr>
<tr>
<td>Part 10.</td>
<td>Campus and External Relations</td>
<td>7</td>
<td>8</td>
<td>2</td>
<td>3.50</td>
<td>Well Met</td>
</tr>
<tr>
<td>Part 1.</td>
<td>Mission</td>
<td>32</td>
<td>36</td>
<td>9</td>
<td>3.56</td>
<td>Well Met</td>
</tr>
<tr>
<td>Overall</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2.78</td>
<td>Minimally Met</td>
</tr>
</tbody>
</table>

**KEY:**

- ND = Not Done (0) 0 - .99
- 1 = Not Met 1 - 1.99
- 2 = Minimally Met 2 - 2.99
- 3 = Well Met 3 - 3.99
- 4 = Fully Met 4
- NR = Not Rated NR

### Summary and Conclusion

The internal review process revealed the University Center’s (UC) strengths and opportunities for improvement when measured against the CAS College Union Standards. The overall rating of minimally met and not receiving any fully met ratings may be interpreted as the UC having room for improvement. An indirect and unforeseen outcome of the process was the realization that the department does not document well how it operates or functions. When attempting to gather evidence to show how a standard or criterion was being met or not, the assessment committee members often found little or no evidence (i.e., they knew the UC did it, but had no evidence to support the claim). They realized that often times how the department achieves the mission is through undocumented practices developed over time, through the experiences of a seasoned staff, and often by making decisions and changing practices from anecdote, trends, or perceived best practices within the field, not necessarily driven by theory or with documentation of rationale.
for past or current practices. Better documentation of how (and why) the UC operates the way it does will undoubtedly improve the program’s intentionality, transparency, and accountability.

Although there appears to be room for improvement in all areas of the University Center (see Table 1.), the following six standards could be interpreted as strengths (well met) of the UC program:

1. Mission ($\bar{x} = 3.56$)
2. Campus and External Relations ($\bar{x} = 3.50$)
3. Diversity ($\bar{x} = 3.25$), Financial Resources ($\bar{x} = 3.25$)
4. Organization and Management ($\bar{x} = 3.14$)
5. Human Resources ($\bar{x} = 3.07$)
6. Facilities, Technology, and Equipment ($\bar{x} = 3.0$)

The only ND rating given by UCAC was under the Equity and Access standard (9.1.1): “Services are conveniently available and accessible to distance learner students or arrangements have been made for students to have access to related services in their geographical area.” The decision was made to leave this in as a criterion measure although the UC is not currently expected to fulfill this obligation. But, this is an area the UC should be planning for as services evolve, especially with the University’s initiative to improve graduate and distance education.

Five areas could be interpreted as opportunities for improvement (minimally met):

1. Leadership ($\bar{x} = 2.75$)
2. Legal Responsibilities ($\bar{x} = 2.67$)
3. Ethics ($\bar{x} = 2.25$)
4. Equity and Access ($\bar{x} = 2.14$)
5. Program ($\bar{x} = 2.12$)
6. Assessment and Evaluation ($\bar{x} = 1.40$)

Overall, the department received a minimally met rating ($\bar{x} = 2.78$), only .22 points below well met, and Assessment and Evaluation was the only standard awarded a not met rating ($\bar{x} = 1.40$).

The University Center Assessment Committee (UCAC) deemed the ratings accurate and reflective of the evidence available to judge the UC’s achievement of the criterion measures. They also learned a great deal through this process beyond what was previously mentioned:

1. Thoughtful engagement in a systematic self-assessment on a regular basis is valuable, educational, and critical to achieving the mission of the UC.
2. The UC has a tremendous amount to be proud of, especially under the fiscal circumstances of Montana and The University of Montana.
3. There will always be room for improvement; dedicating time and energy toward this endeavor is something the UC should practice.
Step Six: Completing the External/Peer-Review Process

*Completed site visit March 16, 2010; Report delivered April 21, 2010*

Introduction to External Review

In honoring the charge of VP Branch, the University Center included in its program review an external or peer review. Consultation services were secured through the Association of College Unions International (ACUI), College and University Self Assessment (CUSA) program for an early spring site visit (March 14-16, 2010). The expenses for the consultants’ services, lodging, travel, and catering for the site visit meetings are provided below (Table 2.).

Table 2. External Review Expenses

<table>
<thead>
<tr>
<th>Vendor/Service</th>
<th>Expense</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACUI – CUSA Consulting Services</td>
<td>$4,500.00</td>
</tr>
<tr>
<td>Site Visit Lodging</td>
<td>$594.92</td>
</tr>
<tr>
<td>Site Visit Travel - Airfare</td>
<td>$802.80</td>
</tr>
<tr>
<td>University Catering Services</td>
<td>$577.09</td>
</tr>
<tr>
<td><strong>Total External Review Expense</strong></td>
<td><strong>$6,474.81</strong></td>
</tr>
</tbody>
</table>

The following report provides the specific details of the consultation and more importantly, the results and recommendations generated from the expert review team during their 2 ½ day site visit. The report was submitted on April 21, 2010 and has been reproduced here with minimal formatting changes; no content has been altered, removed, or added.
EXTERNA/L PEER REVIEW RESULTS

Association of College Unions International
College Union and Student Activities Consultation
University of Montana
March 14–16, 2010

Consultants:

Carlos García (Chair), Director, University Memorial Center
University of Colorado–Boulder
carlos.garcia@colorado.edu
303.492.8832

Michael Ellis, Assistant Vice President for Student Affairs & Executive Director, Lory Student Center
Colorado State University
mike.ellis@colostate.edu
970.491.6395

EXECUTIVE SUMMARY

The University Center at the University of Montana conducted a self-assessment of its program during 2009 and 2010 using the standards and guidelines for the college union established by the Council for the Advancement of Standards (CAS) in Higher Education (2003, sixth edition). The internal review committee concluded that the University Center had minimally met the standards set forth by CAS. As part of the review process, the University Center brought in two external reviewers to also assess the program and validate the self-study results.

The external review team of Carlos García, University of Colorado–Boulder, and Michael Ellis, Colorado State University, visited the University of Montana campus from March 14–16, 2010. They interviewed 84 students, staff, and faculty during the two and one-half day site visit. The external review team focused its attention on providing an external perspective related to the strengths and areas for improvement within the University Center organization, its leadership, human resources, programs and services, and to making recommendations on how the University Center could operate at optimum levels to achieve excellence in these areas.

Throughout the process, the external review team found a great level of cooperation and enthusiasm from those individuals interviewed. The process yielded valuable information, as well as acknowledgement at all levels of the value the University Center provides the University of Montana community. The process also validated the high caliber of leadership enjoyed by the University Center.
In all, the external reviewers identified 51 strengths and 44 opportunities for improvement based on the 13 CAS general standards. The external review team concluded that the University Center is well-positioned in leadership, student affairs philosophy, and programming to take the University Center and its mission into the future. The external review team recommends that the overall assessment of the University Center relative to the CAS College Union Standard should be closer to a well met score than the minimally met score, as concluded by the internal review committee.

Please note that the external review team also referenced the 2003 edition of the CAS College Union Standard, in order to be consistent with the internal review. A new edition of the CAS Standards was published in 2009 and can be acquired at http://www.cas.edu.

**Introduction**

Carlos García, director of the University Memorial Center at the University of Colorado–Boulder, and Michael Ellis, assistant vice president for student affairs and executive director of the Lory Student Center at Colorado State University, were invited to conduct an external review and assessment of the University Center (UC) at the University of Montana–Missoula. García led the review team.

Candy Holt, director of the UC, and Liz Roosa Millar, associate director of the UC and head of the UC Self-Study Oversight Team, developed the charge that formed the basis for the external review team’s discussion with representatives of the University of Montana community and employees within the UC. Specifically, this charge included:

To perform an external/peer review of the University Center’s program and department utilizing the CAS standards established for the College Union (2003 version). The consultants are expected to meet with various contingency groups including but not limited to the following: students, staff, faculty, administrators, and business partners/tenants. The consultants are expected to produce a report that is accessible and can be posted electronically to a website.

The review team used their knowledge of the Council for the Advancement of Standards in Higher Education (CAS) College Union Standard to evaluate the accuracy, effectiveness, and validity of the University Center’s self-assessment, including criteria measurements, evidence, ratings, and action plans.

Once on campus, the external review team met with the following groups of UC stakeholders and constituents:

- UC management team
- Assistant Director Roger Strobel (UC building tour)
- UC Director Candy Holt
- UC Board members and Associated Students of the University of Montana (ASUM) leaders
- Student affairs directors
Representative group of Valued Campus Clients
Vice President for Student Affairs Teresa Branch and Division Budget Officers Charlie Thorne and Jim Darcy
Provost and Vice President for Academic Affairs Royce Engstrom
ASUM Student Senators and other agency representatives
Building partners
Student Involvement, Marketing, and UC Administrative Services
Building Services, Events Planning, Audio & Lighting, and ShipEx teams
Representative UC student employees
UC Director Candy Holt and Associate Director Liz Roosa Millar

In response to the identified charge, the external review team focused its attention on providing an external perspective related to the strengths and areas for improvement within the UC organization, its leadership, human resources, programs, and services, and to making recommendations on how the UC could operate at optimum levels to achieve excellence in these areas.

In forming these findings and recommendations, the external review team was provided a copy of the UC Self-Assessment that comprehensively described the UC programs, facilities, services, and policies. Additionally, the external review team participated in a two and one-half day site visit March 14–16, 2010, during which time in-person interviews of the major constituent groups of the UC were conducted (see Appendix A). In all, 84 persons were interviewed during the site visit (see Appendix B).

The structure of this report is organized according to the 13 general standards found in all of the CAS standards:

- Mission
- Program
- Leadership
- Organization and Management
- Human Resources
- Financial Resources
- Facilities, Technology and Equipment
- Legal Responsibilities
- Equity and Access
- Campus and External Relations
- Diversity
- Ethics
- Assessment and Evaluation

All of the information has been synthesized and presented in terms of generally agreed upon standards for the successful operation of college unions, including the Association of College
Unions International (ACUI) “Role of the College Union” statement (see Appendix C) and the sixth edition of the CAS Standards and Guidelines for the College Union (2003). It should be noted that the external review team’s impressions and recommendations are based on limited observations and may not take into account other factors such as the political environment and/or community relations.

CAS was established to develop and promulgate standards of professional practice to guide practitioners, and their institutions, in their work with college students. The CAS Board of Directors is composed of representatives from 38 professional associations and reflects the length and breadth of the field of student affairs and related programs and services for student development and educational support common to most institutions of higher learning today. CAS has developed and adopted 34 sets of functional area standards and guidelines and one set of master’s-level standards for academic preparation programs in student affairs. The purpose is to provide a set of criteria that every program of quality should meet to provide an effective level of student support. Simply, the standards provide a set of measures against which programs and services can assess themselves.

The findings and recommendations in this report reflect a consensus opinion of the members of the external review team. They are provided as both validation and constructive criticism and should not be viewed as definitive solutions but rather as catalysts for further discussion, inquiry, and action.

**Findings**

Overall, the staff and students of the UC are to be commended for a discerning and penetrating study of the UC. Utilizing the CAS College Union Standard, the UC conducted an analysis of its strengths and weaknesses. This self-assessment and the insights it provided have allowed the staff of the UC to take a good look at where they have been, where they are now, and where they need to go. The results of this self-study can be used to propel the UC forward as one of the regional leaders in the college union profession.

The willingness of everyone involved in the review process to share their experiences, perceptions, and excitement, as well as their constructive insights, made for a cordial and productive work environment. The review team would like to acknowledge the wonderful hospitality extended by Candy Holt, Liz Roosa Millar, the UC staff, and the many individuals that participated in the interview process.

**Mission**

CAS Overview

Mission statements must be consistent with the mission and goals of the institution. The primary goals of the union should be to maintain facilities, provide services, and promote programs responsive to the needs of students and the campus community. The union is a center for the
campus community and, as such, is an integral part of the institution’s educational environment. Through the work of the staff and various committees the union can be a “laboratory” where students can learn and practice leadership, programming, management, social responsibility and interpersonal skills.

The union in higher education must incorporate student learning and student development in its mission. The programs and services must enhance the overall educational experience. Within the context of the institution’s unique mission, multi-dimensional diversity enriches the community and enhances the collegiate experience for all. The union should nurture environments where similarities and differences among people are recognized and honored.

General Impressions

ACUI’s “Role of the College Union” statement describes the college union as “an integral part of the mission of the college,” and the CAS College Union Standard states that “the college union must incorporate student learning and student development in its mission.” Overall, there is a consistent sense from staff, faculty, and students that the UC is an important contributor in meeting the educational mission of the University of Montana. The UC mission statement is readily available on the UC website and reads:

*The University Center is the heart of the University of Montana. It is a gathering place with an atmosphere that is welcoming, full of activity, and alive with diversity. As a bridge between formal classroom learning and life experience, activities coordinated by the University Center work in harmony with the mission of the university. It provides opportunities to develop leadership skills while enhancing an appreciation for responsibility through active student involvement and employment.*

*The University Center serves the university community by providing information resources; a variety of quality, convenient services; a multitude of cultural programs; educational and entertaining events; and recreational and leisure activities; while offering a place for free expression and creative ideas.*

It is evident that a strong desire exists at the UC to provide quality programs and services to the students, faculty, staff and visitors of the University of Montana. Participants overwhelmingly reported that they felt well-served by the breadth and depth of current offerings.

While not all those interviewed could recite the UC mission verbatim, it was evident that most understood the more salient points of the UC mission and the overall concept of the mission. Some business partners have a lesser understanding of the UC mission and some of these partners have a high level of impact on students’ and others’ impressions of the UC. There does not appear to exist a regularly planned time to review the UC mission with staff and constituents, though, to ensure that this understanding is maintained and the strong understanding is not lost. This should be considered by the UC leadership.
Strengths

1. The conceptual mission of the UC as the “heart of the campus” seems to be generally understood by all those who were interviewed and specifically understood by many.
2. The UC Advisory Board clearly understands the mission and role of the UC, and board members appeared to be actively involved in decision making and recommendations that are mission- and values-based.
3. Leadership of the UC clearly embraces the Division of Student Affairs and the University of Montana missions and how they relate to the UC mission.
4. Solid support exists for the mission of the UC from the Student Affairs Division Directors, the Vice President for Student Affairs, and the Provost/Vice President for Academic Affairs.

Opportunities for Improvement

1. Through discussion, clarify the role that each UC business partner plays in assisting the UC to achieve its vision, mission, and goals.
2. Disseminate the mission statement more widely to the university community, particularly outside of the UC; create publicity materials to inform the campus of the mission statement, programs, and services provided by the UC.
3. UC leadership should actively seek opportunities for collaboration with the bookstore leadership and with the university dining leadership to strengthen those relationships so that those business partners better support the mission of the UC.
4. Seek opportunities for more student involvement on university dining and bookstore decisions to better meet the student involvement intent of the UC mission.

CAS Review Rating

The external review team concurs with the internal self-assessment team’s conclusion that the Mission standard has been well met.

PROGRAM

CAS Overview

The formal education of students consists of the curriculum and the cocurriculum, and must promote student learning and development that is purposeful and holistic. The college union must identify relevant and desirable student learning and developmental outcomes and provide programs and services that encourage the achievement of those outcomes.

Activities and services must be appropriate to the size and diversity of the campus and must provide opportunities for student, staff and faculty participation, interaction, and collaboration on policy establishment, facility operation and program activities. The college union should provide food services, meeting rooms, student and administrative offices, an information center, lounges, a
store, recreation facilities and restrooms, and programs that are varied and diverse, reflecting the richness of the community’s culture.

General Impressions

The UC is unquestionably the favorite campus location for meeting with friends, visiting the bookstore or food court, and studying or enjoying a program. UC Student Involvement (UCSI) reflects the University Center’s commitment to serving students as well as faculty, staff, and guests of the UC with genuine care and excellence. In addition, recent changes in the Student Organizations Suite (SOS) to support multiple student organizations and open the space have been well received. The variety of student groups represented is an untapped source of energy for campus, but if channeled effectively could provide infinite benefits for the whole community.

Student government, ASUM, plays an active and vibrant role in both the UC’s and the University’s decision-making processes. Yet, this organization could be hampered by its multiple missions, including student advocacy, activities, and student organizations. It is often challenging for any organization to have multiple missions. The most prominent example is the fact that ASUM Productions has responsibility for many of the activities and events on campus. The activities and programs presented by this group are quite good. However, planning and execution of such events often consumes an inordinate amount of staff time, particularly for the conference and event planning office. Student government is an important part of the governance of any campus, and as such, should devote its energies in areas that have a major impact on the delivery of the university’s mission, present and future. The establishment of a student activities programming board under advisement from the UC should be explored and would provide students outside of student government an opportunity to get involved in leadership. This would also allow ASUM leaders a chance to focus on broader issues and concerns affecting student life at the University of Montana.

The CAS internal assessment process identified the need to increase overall awareness around student learning outcomes and opportunities. To this end, the leadership of the UC has actively pursued the implementation of student learning outcomes for all student employee positions in the UC. There is no argument that student learning outcomes should be identified for all experiences within the UC, and particularly within the UCSI areas of responsibility.

The internal assessment process also identified the need for increased assessment to remain responsive to the needs of all students. One area that should be evaluated is the desire expressed to add more programs and attractions to the UC, to make it even more of a destination rather than a building with a bookstore and food.

Specific recommendations have not been made for additional retail outlets in the UC because this decision depends on so many variables such as the local culture, town-gown relationships, and preferences of the market being served. It is our general sense that there is a good mix of retail services, and rental returns to the UC appear to be established at fair market value. This does not
appear to be a significant source of additional revenues, and if anything, the UC is doing well to maintain its current rental income stream.

Strengths

1. UC staff are universally viewed as helpful, open, fun, resourceful, and willing to “bend over backwards” to serve students and other members of the university community.
2. The addition of student employee learning outcomes to all student position descriptions is a solid example of the UC’s efforts to promote intentional student learning.
3. Support for the Study Jam demonstrates purposeful use of the UC for student learning.
4. The UC Game Room is a vibrant and popular destination for students.

Opportunities for Improvement

1. Promote the variety and diversity of student organizations located in the UC; tap into this source of unlimited energy and collaboration.
2. UCSI staff should set the standard for working closely with various departments and organizations to enhance the diverse programs for the campus. UCSI does some of this already (e.g., Day of Dialogue); the endeavor can and should be expanded.
3. In collaboration with other organizations, departments, and tenants housed in the UC, UCSI staff can take the lead in creating a UC that is truly the hub of the University—all day and all night. It is a tremendous challenge, and it is the belief of the review team that it is the role of a comprehensive campus activities program to assume this important responsibility.
4. The UC needs more programming space. It is advisable to review the space options—those in the UC and those across campus—to make sure that appropriate spaces are included in the UC’s master plan.
5. Feedback related to the bookstore was that it seemed to lack a presence of student employees and may be out of touch with student needs. Additional assessment activities, including the NACS survey of student and faculty perceptions, are recommended.
6. While the facility is clean and well kept, efficiencies can be gained in moving the custodial night shift to a late afternoon/evening shift.

CAS Review Rating

The external review team concurs with the internal self-assessment team’s conclusion that the Mission standard has been minimally met.

LEADERSHIP

CAS Overview

Effective and ethical leadership is essential to the success of all organizations. Leaders must be selected on the basis of education and training, work experience and competencies, as well as ability to promote learning and development in students, and be a “good fit” for the campus.
college union leader must exercise authority over resources for which they are responsible to achieve their mission.

Leaders must identify and address individual, organizational or environmental conditions that inhibit goal achievement, and must promote opportunities for student learning and development.

General Impressions

The UC is in excellent shape under the capable leadership of Candy Holt. Holt holds a Master of Public Administration degree with an emphasis in staff development and organizational management from the University of Montana and has 20 years experience in the college union profession and 29 years overall working in higher education. She is committed to developing a quality college union that responds to the needs of the University of Montana, as demonstrated by her leadership in pursuing the self-assessment. She has also been active in the Association of College Unions International (ACUI) at the regional level since 1989.

The UC employs an additional professional employee, an associate director, as well as four classified department heads: an assistant director of marketing and communications, an assistant director of building services, an assistant director of student involvement and leadership development, and a business manager, with all other leadership positions occupied by additional classified staff. These professional UC department heads appear to have the level of experience necessary to perform their duties. Some staff members hold advanced degrees in the field, such as the associate director having a Ph.D. in Higher Education from Pennsylvania State University, and the assistant director for student involvement and leadership development having an M.P.A. degree. Other department heads have bachelor’s degrees, with the exception of the business manager. In addition, outstanding student leadership positions are provided through the employment of students in management positions and supervisory roles. In general, the external review committee is in agreement with the CAS self-assessment team that area leaders have strong experience and the majority have strong academic credentials, and that leadership of UC areas is solid.

Strengths

1. Capable leadership of the UC director.
2. Great recent asset to the leadership team with the arrival of the associate director who has formal training in student affairs and higher education.
3. Senior leadership and staff are committed, loyal, and responsive, in spite of limited resources; leaders are respected and viewed as professional.
4. Leadership is also committed to the role of the UC related to student development and learning.
5. Leadership team for the most part was reported to work well as a team for the betterment of the UC and the students it serves.
Opportunities for Improvement

1. Succession planning should be a top priority of the leadership team, specifically because of the approaching retirement date of the assistant director of building services.

2. The business office department head is the only member of the UC leadership team with the title of “manager” versus “assistant director.” Investigate whether it makes sense to change that position’s title to “assistant director of business services” to provide the same level of influence enjoyed by the other members of the UC leadership team.

CAS Review Rating

The external review team disagrees with the internal self-assessment team’s conclusion that the Leadership standard has been minimally met and suggests that it be revised to well met.

**Organization and Management**

CAS Overview

Guided by an overarching intent to ensure student learning and development, programs and services must be structured purposefully and managed effectively to achieve stated goals. Evidence of appropriate structure must include current and accessible policies and procedures, written performance expectations for all employees, functional workflow graphics or organizational charts, and clearly stated service delivery expectations.

Evidence of effective management must include use of comprehensive and accurate information for decisions, clear sources and channels of authority, effective communication practices, decision-making and conflict resolution procedures, responsiveness to changing conditions, accountability and evaluation systems, and recognition and reward processes. The college union must provide channels within the organization for regular review of administrative policies and procedures.

The college union must be organized to maintain its physical plant, to provide for cultural, intellectual, and recreational programming, to operate its business enterprises, and successfully deliver the services inherent in the union’s mission. Members of the campus community should be involved in its governance structure and in the development of policies for the union.

General Impressions

The most outstanding qualities that pervade the UC are the commitment of the staff to serve the university and a genuine care for the personal and educational well-being of students. Through the entire review team’s visit, these qualities were consistently mentioned by interview participants. Staff members are competent, know their jobs, and understand what is expected of them.

Organizational charts were provided and were relatively clear to the external review team, although they appear to be somewhat out of date (a more current organizational chart was provided).
provided to the review team after its site visit). It is evident that the leadership is committed to staffing that is appropriate for the UC, and staffing patterns are modified as necessary and/or as funding allows.

It is not uncommon for college unions to exhibit some friction or sense of disconnection between operational and programmatic areas. This clearly was not the case at the UC, and staff is to be commended for their mutual respect, understanding, and appreciation for these two distinctly different, but critical, areas of the UC.

It is also apparent that the UC Advisory Board has traditionally become an integral part of the planning and decision making for the UC, though the UC director reported that this year the board has been less active. However, in meeting with board members, the external reviewers did not see much evidence of this concern. The director, in general, has a positive relationship with the board and its chair, and the board is instrumental in key decisions affecting the UC’s future, including budget development.

Strengths

1. The UC Advisory Board is integral to the decision and policy making of the UC and clearly understands its role.
2. In general, the UC organization values diversity and understands the important role of programs in meeting the mission of the UC.
3. The staff’s commitment to increase/expand student development and learning opportunities was pervasive throughout the UC.

Opportunities for Improvement

1. The UC director should work more closely with the UC Advisory Board chair to ensure that appropriate learning experiences for the incumbent are properly fostered and to create a launching point for a positive relationship with next year’s chair.
2. Work with ASUM to emphasize the significant role and responsibility of the UC Advisory Board chair.
3. Revise the current organizational chart so that it more properly represents the current organization.

CAS Review Rating

The external review team concurs with the internal self-assessment team’s conclusion that the Organization and Management standard has been well met.
CAS Overview

The college union must be adequately staffed by individuals qualified to accomplish its mission and goals. Professional staff members must hold an earned graduate degree relevant to the position they hold or possess an appropriate combination of educational credentials and related work experience. Student employees and volunteers must be carefully selected, trained, supervised, and evaluated.

The college union must institute hiring and promotion practices that are fair, inclusive, and nondiscriminatory and employ a diverse staff to provide readily identifiable role models for students and to enrich the campus community. Staff should be evaluated on a regular basis and provided access to continuing education and professional development opportunities.

General Impressions

While it is important that professional staff meet qualifications in terms of academic preparation, experience, and skills, it is even more important that care be given to the selection of individuals who maintain a positive attitude, are able to work with a variety of people and situations, and demonstrate ethical standards in their conduct. The staff of the UC demonstrates these personal qualities of care and concern, and a high regard for ethical standards was evident.

One of the greatest challenges of the UC is ensuring a diverse pool of applicants given that the State Classified personnel system often limits qualified candidates. For example, maintaining the program advisor positions in the Student Involvement and Leadership Development area of the UC as State Classified personnel can limit the pool of applicants to in-state residents only. Candidate pools that include applicants with advanced degrees in student affairs or in higher education could be greatly enhanced by changing these positions to exempt professionals.

Another challenge the UC faces is the Montana salary structure, which inhibits the ability to attract out of state candidates to positions. Though home-grown candidates can bring a tremendous amount of loyalty and stability to an organization, being able to attract outside candidates can diversify the applicant pool and attract individuals with higher education and/or student affairs credentials to the UC.

As is common place on many campuses today, many employees will soon be retiring and the University of Montana is not immune from this current reality. The UC will need to address this possibility in many areas to ensure that it does not suffer unduly when this occurs in their staffing levels.

Strengths

1. Staff’s demonstration of care and concern, with high regard for ethical standards.
2. Many long-term employees with a lot of history and knowledge of the operation.
3. Student employees feel valued and respected by the UC staff, and they recognize personal
growth as a result of their student employee positions.
4. Both student and career staff receive annual evaluations.

Opportunities for Improvement

1. As program advisor positions become available, consider conversion of these positions from
   state classified to professional exempt.
2. Provide educational opportunities for staff to further their education in the student affairs or
   higher education fields.
3. Develop a leadership succession plan to prepare for impending retirements (e.g., the assistant
director of building services has more than 30 years of knowledge that he will take with him if a
knowledge-transfer plan is not enacted soon).

CAS Review Rating

The external review team concurs with the internal self-assessment team’s conclusion that the
Human Resources standard has been well met.

FINANCIAL RESOURCES

CAS Overview

The college union must have adequate funding to accomplish its mission and goals. Funding
priorities must be determined within the context of the stated mission, goals, objectives, and
comprehensive analysis of the needs and capabilities of students and the availability of internal or
external resources.

The college union must demonstrate fiscal responsibility and cost effectiveness consistent with
institutional protocols. The institution’s budget commitment to the union should be sufficient to
support the achievement of its mission and to provide appropriate services, facilities, and programs
deemed necessary to maintain standards and diversity of services commensurate with the image
and reputation of the institution.

The college union should have adequate financial resources to ensure reasonable pricing of services,
adequate programming, adequate staffing, proper maintenance and professional development. The
institution should consider various methods and sources of financial support including, but not
limited to: income from sales, services, and rentals; student activities or program fees; fees for
operation or debt service; and direct institutional support.
General Impressions

The UC is an auxiliary enterprise of the university, and as such, is expected to generate much of its own income. Based on a review of the “Operating Unit Plan,” it appears that UC revenues will total approximately $3.6 million in FY 2011, of which 60% is directly attributed to the student union operating fee. The student union operating fee will increase from $84.80 to $87.60 in FY 2011 as a result of the automatic indexing of fees based upon inflationary factors. Total UC revenues are as follows:

<table>
<thead>
<tr>
<th>Revenue Source</th>
<th>Percent of Revenue (approximate)</th>
<th>Budgeted Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Union Operating Fee</td>
<td>60 %</td>
<td>$2,176,597.00</td>
</tr>
<tr>
<td>HHP Class Fees</td>
<td>1.2 %</td>
<td>$43,309.00</td>
</tr>
<tr>
<td>Lease Revenue</td>
<td>20 %</td>
<td>$721,813.00</td>
</tr>
<tr>
<td>Facility Use Rental Fees</td>
<td>10 %</td>
<td>$354,972.00</td>
</tr>
<tr>
<td>Misc. Revenue</td>
<td>8.7%</td>
<td>$312,376.00</td>
</tr>
<tr>
<td><strong>Total Revenues</strong></td>
<td></td>
<td><strong>$3,609,067.00</strong></td>
</tr>
</tbody>
</table>

After all expenditures, including professional, classified and student staff wages, travel/professional development, contracted services, utilities, and supplies, the UC expects to maintain its fund balance of approximately $330,000 at year end.

The UC appears to be operating with, and guided by, sound financial principles and practices. The UC management team possesses a solid understanding of cost accounting and retail management within a typical fund accounting environment. Moreover, the staff understands the need to generate sufficient revenues to fund both day-to-day activities and to create a healthy accumulation of reserves for future investment in the physical assets of the UC. There is a serious issue, however, in the lack of reserves needed to fund necessary facility improvements now and in the near future.

Overall, it appears the UC budget supports the organizational mission and objectives, and reflects the philosophy and plans of the Division of Student Affairs as demonstrated in the “FY 2011 Operating Unit Plan.” The internal review reflects an accurate understanding of what may be required to create a more stable financial position, while also targeting limited resources toward strategic priorities. The UC’s pricing schedules (i.e., tenant lease rates, meeting spaces, and food prices) appear to be competitive with other college unions as well as the local market, and reasonable value is offered relative to the prices paid.

In many college unions, dining and bookstore operations are a source of net revenues that are subsequently used to offset operating costs elsewhere in the organization, keep student fees as low as possible, and contribute to reserves for future expenditure on strategic priorities and capital or other facility needs. It may be helpful if the Division of Student Affairs could convene discussions with key leadership in university dining, the bookstore, and the UC to clarify financial objectives for
these areas and the UC as a whole. If net profits support only university dining and the bookstore or venues outside the UC, additional support and funding from the UC and/or the university will be necessary to fund deferred maintenance, building renovation and repair, and strategic priorities. On the other hand, if the UC is expected to be entirely financially self-sufficient, support among these entities for price increases, increased budget requests, or alternative sources of funding will be important. The creation of multiple satellite locations for both the bookstore and university dining is both expensive and is likely to detract from the mission of the UC. Given the role of the UC as a community builder for the public good, it would be helpful for the UC to initiate discussions with university stakeholders about whether funding to create such satellite locations could be better directed or whether a greater level of institutional financial support would be appropriate given the UC’s contributions to campus life.

The other major source of revenues for student unions is student fees. ASUM and the UC Board have endorsed a ratio of student fees vis-à-vis other sources of revenue at 60–40%, respectively. Current economic conditions, along with the UC’s growing facility needs, will make this ratio increasingly challenging in the future. The reviewers’ agree that the potential for increases in lease agreements and facility rental rates are nearly maxed out, and identifying new sources of revenue beyond student fees is problematic. This student fee ratio will need to be revisited for the UC to address its facility needs.

Strengths

1. There is strong support from students as reflected by the fee allocation dedicated in support of the UC and the automatic indexing of fees based upon inflationary factors.
2. Highly efficient organization, capable of offering a myriad of programs, services, and facilities on limited financial and human resources.
3. Financial aptitude of UC staff.
4. Commitment of UC to reallocate scarce funds toward student-focused areas.
5. Administration and UC staff acknowledge the need for creating new revenue streams and appear to be open to changes in support of this need.

Opportunities for Improvement

1. Consensus generating discussions regarding financial objectives and long-term funding (5–20 years) should occur between five key partners: Division of Student Affairs, ASUM, university dining, bookstore, and UC leadership; organizational boundaries seem to have impeded the funding for critical facility improvements.
2. Need for a long-term capital funding plan and funding sources for necessary facility improvements. A minimum amount for R&R improvements should be $1 per square foot annually, and many college unions spend between $1.50–2.00 per square foot.
3. Consider extending the union operating fee for students in the College of Technology who currently do not pay this fee. The value of their degree is directly related to the quality of facilities on the University of Montana’s main campus.
CAS Review Rating

The external review team disagrees with the internal self-assessment team’s conclusion that the Financial Resources standard has been well met and suggests that it be revised to minimally met.

FACILITIES, TECHNOLOGY, AND EQUIPMENT

CAS Overview

The college union must have adequate and suitably located facilities, technology, and equipment to support its mission and goals efficiently and effectively.

The physical plant should be proportional in size to the campus population, containing approximately 10 square feet of space per student enrolled. Smaller colleges may require more square feet, and large colleges fewer square feet/student. Also to be considered is the nature of the student body. Colleges with a large number of commuter students might adjust facility requirements accordingly.

General Impressions

Overall, the UC provides an attractive, inviting environment and is duly acknowledged as the University of Montana’s welcome center and heart of the campus. Building traffic counts support this assessment with approximately 9,000 people visiting the building each day. At 212,219 gross square feet, the building appears to be adequately sized for a 14,200 student campus. The UC enjoys a relatively central location on campus and unrivaled views of the beautiful mountains and outdoor vistas that draw so many to the Montana campus. Overall, the facility is well-maintained, the central atrium with its tropical garden entryway provides a dramatic impression upon entering the facility, and students, faculty, and staff recognize that the focus of the UC is to provide services to students and the campus community.

In turn, there is a need and desire to make the UC even more of a destination and campus showplace. Recommendations include capitalizing on this campus pride and two major aspects that bring students to the University of Montana; namely the city of Missoula and proximity to the mountains. The UC should strive to capture the essence of Montana within the building, via programs, services, and physical aspects; expand use of contiguous outdoor spaces; and capitalize on the lovely mountain views.

Other recommendations are to increase meeting and conference room capacity, and related staffing. There was also mention that additional lounge space was needed. The aging infrastructure of the 41-year-old building is also in need of attention. The external reviewers heard from virtually every group interviewed that the lone passenger elevator is an issue that must be dealt with sooner than later. Similar comments were made of the freight elevators by the staff who relies on them daily to do their jobs.
Students and staff alike also commented on the need for more ways of finding information, particularly to help students discover the many resources and services tucked down corridors, away from main circulation paths. Improved directory-style information in select parts of the building would help to inform users of the many services and program areas hidden throughout the UC, and such signage should be designed in a way to add fun and personality at all entry points for a real arrival experience.

There were some concerns that the UC stands for “upper classmen” and thus, is not as inviting to first-year students as it could be. Other than the fact that this was brought up on more than one occasion during the interviews, the external review team did not find any evidence to suggest that the UC was not welcoming to first-year students.

The food and dining areas that dominate much of the UC’s second floor are widely regarded as needing attention and redevelopment. General consensus is that this core service program of the UC needs the infusion of a student perspective. The lack of student involvement in decisions regarding food choices was clearly articulated by the various groups of students interviewed. This view was supported by the UC senior staff who rightfully want to make sure that all experiences students have in the UC are as positive and enriching as possible.

The building operations staff is acknowledged for their responsiveness; however, the UC’s aging infrastructure and technical support has constrained high-quality service to clients. Audio-visual equipment available in meeting rooms lags behind client needs, the loading dock and storage areas are inadequate, and air cooling is insufficient in some areas of the building.

Strengths

1. The facility is clean, well-maintained, and aesthetically pleasing.
2. The garden atrium offers prime location to inform visitors of what the UC offers and what is occurring on any given day through the use of innovative programming.
3. Campus community feels welcome and at home in the UC. Central location makes it the prime meeting and social spot.
4. The facility experiences a great amount of use by all aspects of the campus community.

Opportunities for Improvement

1. The ballroom is a highly-used and sought facility. Investing in better sound equipment, ceiling acoustical texturing, lighting, and flooring will be beneficial.
2. Identify representations of the essence of Montana and incorporate through the building.
3. Capitalize on existing outdoor areas; create new gathering areas by adding furniture, tables, and/or programs in these spaces to enhance community and build a social scene while providing additional seating and highlighting outdoor vistas.
4. Invest in technology equipment to remain current and relevant to conference guests and students.
5. Address the elevator issues, both passenger and freight.
6. Develop a funding structure so that $1.50–2.00 per square foot of facility is dedicated annually to facility improvements ($318,000 to $424,000).

CAS Review Rating

The external review team concurs with the internal self-assessment team’s conclusion that the Facilities, Technology, and Equipment standard has been well met.

LEGAL RESPONSIBILITIES

CAS Overview

Staff members must be knowledgeable about and responsive to laws and regulations that relate to their responsibilities. Staff must use reasonable and informed practices to limit the liability of the institution and, as appropriate, inform users of programs and services of legal obligations and limitations.

The institution must inform staff and students of changing legal obligations and potential liabilities in a timely fashion.

General Impressions

The absence of significant findings or impressions relative to Legal Responsibilities should be interpreted positively—the internal assessment appears accurate and the external review team discovered nothing of concern. The UC Assessment Committee report appears to be thorough.

Strengths

1. Availability of UM legal counsel and UM policies, including sexual harassment training and liability issues advice.
2. Senior staff is seasoned, experienced, and serve as excellent resources for their areas, as demonstrated by the UC Appropriate Conduct Memo written by Candy Holt.
4. UC policies in place.

Opportunities for Improvement

1. Make information regarding legal responsibilities part of the career and student staff orientation process.

CAS Review Rating

The external review team disagrees with the internal self-assessment team’s conclusion that the Legal Responsibilities standard has been minimally met and suggests that it be revised to well met.
EQUITY AND ACCESS

CAS Overview

The college union must be open and readily accessible to all students and must not discriminate except where sanctioned by law and institutional policy. Discrimination must be avoided on the basis of age; color; creed; cultural heritage; disability; ethnicity; gender identity; nationality; political affiliation; religious affiliation; gender; sexual orientation; or social, economic, marital or veteran status.

Within the context of each institution's unique mission, diversity enriches the community and enhances the collegiate experience for all; therefore, the college union must nurture environments where commonalities and differences among people are recognized and honored.

Staff must ensure that services and programs are provided on a fair and equitable basis and must be accessible. The college union must take affirmative action to remedy imbalances in student participation and staffing patterns.

The college union must promote educational experiences that are characterized by open and continuous communication that deepens understanding of one's own identity, culture, and heritage and that of others. The union must educate and promote respect about commonalities and differences; further, the characteristics and needs of a diverse population must be addressed when establishing and implementing policies and procedures.

General Impressions

The absence of significant findings or impressions related to equity and access should be interpreted positively—the internal assessment appears accurate and the external review team discovered nothing of concern. The UC Assessment Committee report appears to be thorough and recommendations in this area should be implemented.

Strengths

1. Presence of the President’s Diversity Statement, the University’s Equal Opportunity/Affirmative Action Statement, and specified grievance procedures.
2. Commitment to accessibility in facility spaces through renovations, including new restrooms.

Opportunities for Improvement

1. Conduct an analysis of facility accessibility and circulation as part of the facility master plan (the director’s office should be fully accessible for all).
2. Make information regarding sexual harassment and grievance procedures part of the career and student staff orientation process.
CAS Review Rating

The external review team concurs with the internal self-assessment team’s conclusion that the Equity and Access standard has been *minimally met*.

**Campus and External Relations**

**CAS Overview**

The college union must establish, maintain and promote effective relations with relevant individuals, campus offices, and external agencies. The success of the college union depends on the maintenance of good relationships with students, faculty, administrators, alumni, the community at large, contractors and support agencies. Staff members must encourage participation in union programs as the involvement of faculty, staff, and alumni is essential to the vitality of union programs and services.

Each member of the campus community is a potential patron of the union’s services, a potential member of the union organization, including its governing board and a potential participant in the union’s programming.

- Students are the principle constituency of the union. Much of the vitality, variety, and spontaneity of the union’s activities stem from student boards and committees.
- Student government and other groups should have ongoing involvement with the union’s programs, services, and operations.
- Student publications also may be important for communicating information about union programs. Communications with students should be continuous.
- The involvement of faculty, staff, and alumni is essential to the vitality of the college union programs and services.
- Faculty members should be involved in policy-making processes and program efforts to the college union.
- Alumni are potential sources of support and involvement, financial and otherwise.
- The administrative staff of the university is important to the day-to-day operations of the college union. In some instances, important college union services such as food, cleaning, repairs, bookstore, or accounting may be administered by a department of the college rather than by college union staff; relations with those department heads and their representatives must be cultivated carefully. The support of other student affairs agencies as well as chief campus officials is important.
- Technical and clerical staff members can be important as customers, members of the various committees, and members of the governing board.
- Positive relations with lessees and contractors (e.g., barbershops, boutiques, food service, bookstores) require close and continual attention.
General Impressions

The UC is viewed and respected across campus as the center of campus life, as exemplified in descriptions of the UC as “committed to shared governance with students,” a place that people like, and as the “hub” of campus. Students regard the UC as the primary place to go to meet friends, connect for social life and participate in services and spaces that define the University of Montana experience.

Overall, participants expressed positive feelings about the responsiveness and service-oriented attitude when dealing with members of the UC staff. The director was often cited as being instrumental in developing better campus relations and for improving the external image of the UC. Students, staff, and faculty expressed satisfaction with the kind of straight-forward, honest, and “willing to work together” attitude communicated and demonstrated by the UC.

The UC Board is broadly representative, knowledgeable of the UC’s strengths and challenges, and articulate in conveying the mission and needs of the UC. The UC’s interest in expanding its use of student learning outcomes should be supported as a tremendous collaborative and training opportunity—between UC departments and, potentially, throughout the division. Finally, relationships with other university offices within the UC and across campus appear strong and positive.

While the internal assessment rating is accurate and deservedly high, action steps can be taken in this area with strong returns. Some building tenants were unable to articulate the mission of the UC, and hence may not see themselves as critical in student learning (e.g., developing leadership skills among their employees) and in developing a strong sense of community at the University of Montana. Additionally, the need for a comprehensive public relations and marketing program for UC activities and services is apparent. An estimated 9,000 individuals walk through the building each day (Monday through Friday), and many seem to be intentional about going to a particular place in the UC or to use a destination or service. The atrium is sometimes viewed as being too crowded. Services in the UC seem to be highly used by the campus community and external constituents.

Strengths

1. Regard for the UC as central to the University of Montana experience.
2. Commitment to communication and collaboration with external stakeholders and internal partners.
3. An effective and articulate UC Board, with a sound student-focused model and faculty and staff involvement.
4. Relationship with ASUM is good.
Opportunities for Improvement

1. Increase the visibility of the UC Board by posting their mission and members’ photos in a high-traffic area.
2. Continue to emphasize marketing for the UC through further investment of resources in this area.
3. Convene a semester meeting of building tenants to review marketing strategies, share assessment results, and develop strategies for the greater good.
4. Continue to develop the UC as symbolic of the University of Montana’s history.

CAS Review Rating

The external review team concurs with the internal self-assessment team’s conclusion that the Campus and External Relations standard has been well met.

DIVERSITY

CAS Overview

Within the context of each institution’s unique mission, diversity enriches the community and enhances the collegiate experience for all; therefore, programs and services must nurture environments where commonalities and differences among people are recognized and honored.

The college union must promote educational experiences characterized by open and continuous communication that deepens understanding of one’s own identity, culture, and heritage and those of others. Programs and services must educate and promote respect about commonalities and differences in their historical and cultural context.

The college union must address the characteristics and needs of a diverse population when establishing and implementing policies and procedures.

General Impressions

The UC should be commended on its commitment to a broad definition of inclusion and diversity. It was evident to the reviewers that UC staff takes this commitment seriously, expresses pride in their commitment to the “Day of Dialogue” program, and enjoys offering important programs and other services that actively promote inclusion. Renovations to restrooms to make them universally accessible and the provision of Assistive Listening Systems symbolize UC’s commitment to diversity and the UC as a beacon for those who seek inclusive and valuing environments.

While the student and nonstudent staffing demographics reflect less diversity from historically underrepresented groups than the UC desires, the UC has made important gains in promoting and hiring women into important positions.
Though one may exist, the external review team was not made aware of the existence of a UC diversity statement. The creation of one might augment the UC’s demonstrated value of diversity.

Strengths

1. Broad commitment to equity, access, diversity, and an institutional culture that values diversity.
2. The number of well-qualified women in senior and decision-making positions.
3. Programs and services offered by the UC (e.g., Day of Dialogue).
4. Progress in renovating restrooms to be universally accessible.
5. Accessibility for participants has been maximized through the availability of Assistive Listening Systems for people who are hearing impaired for all programs occurring within the facility.

Opportunities for Improvement

1. Increased collaboration with the diversity-related resources and partners that exist within the UC and across campus.
2. Careful analysis of facility accessibility and circulation (noted previously).
3. Increased art throughout the facility to reflect Montana’s rich diversity.
4. Create a UC diversity statement.

CAS Review Rating

The external review team concurs with the internal self-assessment team’s conclusion that the Diversity standard has been well met.

ETHICS

CAS Overview

All persons involved in the delivery of programs and services in the college union must adhere to the highest principles of ethical behavior. Programs and services must develop and implement statements of ethical practice and review periodically.

Staff must ensure the privacy and confidentiality of all communications and educational records, must avoid personal conflicts of interest of appearance thereof, and will strive to ensure the fair, objective, and impartial treatment of all individuals with whom they deal.

General impressions

The absence of significant findings or impressions relative to ethics should be interpreted positively—the internal assessment appears to be accurate and the external review team discovered nothing of concern. The UC Assessment Committee report appears to be thorough and, if anything, could have been more generous in its numerical rating.
Strengths

1. In general, staff of the UM is dedicated to high standards of performance, service, and professionalism.
2. Fiduciary responsibilities appear to be appropriately emphasized by the director.

Opportunities for Improvement

1. Pursue all “ethics” action items identified in the internal assessment (e.g., signing of Computer Ethics Agreement).
2. Review whether the appropriate separation of duties are in place for generally accepted accounting practices.

CAS Review Rating

The external review team concurs with the internal self-assessment team’s conclusion that the Ethics standard has been at least minimally met.

ASSESSMENT AND EVALUATION

CAS Overview

The college union must conduct regular assessment and evaluations to determine whether, and to what degree, the stated mission, goals, and student learning and development outcomes are being met. Data must include responses from students and all other constituencies.

The college union must periodically evaluate how it enhances the institution’s stated mission and educational effectiveness. Results of these evaluations must be used in revising and improving programs and services and in recognizing staff performance. Evaluation of union facilities, staff, programs, services, and governance must be continuous and must be within the context of the union’s mission. Periodic reports, statistically valid research, and outside reviews should be utilized.

General Impressions

The UC appears to be headed in the right direction in committing itself to assessment and evaluation as a tool for continuous improvement. The fact that the UC has embarked upon a detailed and thorough CAS internal assessment process places it among only a handful of college unions nationally that attempt such a rigorous, educationally significant, and time-consuming process. This single decision validates extraordinary commitment to assessment and should be commended.

Often, the process itself is as important as the products and action steps resulting from the process. The methodology used was sound, the process was exemplary, and the next step in fully developing self-assessment action steps is encouraged. Because assessment can be a time-consuming activity, it may be worthwhile to develop a research schedule that specifies the type
and frequency of various assessment efforts over a multi-year timeframe. Such a schedule can serve to clarify intentions, organize efforts to avoid redundancy or assessment fatigue, and publicize the UC’s commitment to this type of activity.

The UC should consider the benefits of regionally or nationally normed assessment processes. It appears that at times decisions by or for the UC may be predicated on opinions of well-placed individuals at the university, rather than on facts or information gleaned from the general campus population. Thus, gaining consensus about assessment schedules and efforts may be helpful in gaining consensus for specific decisions. As an example, to counter the perception of the UC as merely a location for upper-class students, assessment data could be used to better inform building tenants in serving the numerous new students who the reviewers anecdotally heard are regular users of the UC. The ACUI EBI survey used in the past could serve as solid platform for moving forward.

Strengths

1. Willingness to specifically initiate the CAS internal assessment process and the inclusive methodology utilized.
2. Overall commitment to assessment and market research.
3. Positive informal relationships with others (students, faculty, staff) as a means for input and feedback.
4. Use of boards and committees for gaining information and making decisions.

Opportunities for Improvement

1. Development of an overall research schedule to guide annual efforts and reach consensus on methods to decision making.
2. Consider use of normed instruments appropriate to the college union setting (i.e., Educational Benchmarking, Inc.; College Union survey from the NASPA Knowledge Consortium; ACUInfo; Noel Levitz student satisfaction instruments; instruments from professional organizations for specific departments—such as National Association for Campus Activities or National Association for College Stores).
3. Encouragement of marketing staff to make use of data and research in its marketing strategies.
4. Seek buy-in from the UC staff about the importance of regularly assessing facilities, programs, and services.

CAS Review Rating

The external review team concurs with the internal self-assessment team’s conclusion that the Assessment and Evaluation standard has been not met, based on historical practices and not on future plans for assessment.
SUMMARY AND CONCLUSION

The external review team’s overall impressions are that the University Center at the University of Montana is a dynamic part of the overall educational mission of the campus. It is truly recognized by the campus community as providing a broad range of valuable facilities, programs, services, and educational opportunities for students. Students and staff consistently recognized the value of the UC both as a facility for programs and activities and as venue for student involvement, learning, and engagement. The external review team concludes that the UC is well-positioned in terms of leadership, student affairs philosophy, and programming to take the UC and its mission into the future.

The UC has the support of both its students and the campus administration. Both clearly recognize the value that this program and facility brings to the campus and the Missoula community. This is a benefit that not all college unions enjoy but has been earned by the UC because of its fine work in collaboration and its developmental approach to working with students.

The external review team believes that the UC can utilize its many strengths to develop plans to address the recommendations listed in the 13 opportunities for improvement sections of this document. Though there are several opportunities for improvement for the UC listed in this report, the external review team believes that the overall assessment of this CAS assessment should be closer to a well met score than the minimally met score as was the conclusion of the internal review committee.

We want to thank the UC leadership and staff, as well as the campus senior administration, for the opportunity to be part of this valuable review process. We offer the UC best wishes as it makes adjustments to its great program to make it even greater.
Program Review Summary

Not surprisingly, the external review results confirmed those of the internal review (Table 3.). Because the external team did not quantify their overall ratings, it is impossible to compare means. However, the ratings of the individual standards and overall rating only slightly differ in four instances (as noted in the external review report above).

**Table 3. UCAC Internal Review Results and ACUI-CUSA External Review Results**

<table>
<thead>
<tr>
<th>Component</th>
<th>Standard</th>
<th>Mean</th>
<th>Internal Rating</th>
<th>External Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part 13.</td>
<td>Assessment and Evaluation</td>
<td>1.40</td>
<td>Not Met</td>
<td>Not Met</td>
</tr>
<tr>
<td>Part 2.</td>
<td>Program</td>
<td>2.12</td>
<td>Minimally Met</td>
<td>Minimally Met</td>
</tr>
<tr>
<td>Part 12.</td>
<td>Ethics</td>
<td>2.25</td>
<td>Minimally Met</td>
<td>Minimally Met</td>
</tr>
<tr>
<td>Part 8.</td>
<td>Legal Responsibilities</td>
<td>2.67</td>
<td>Minimally Met</td>
<td>Well Met</td>
</tr>
<tr>
<td>Part 3.</td>
<td>Leadership</td>
<td>2.75</td>
<td>Minimally Met</td>
<td>Well Met</td>
</tr>
<tr>
<td>Part 7.</td>
<td>Facilities, Technology, &amp; Equipment</td>
<td>3.00</td>
<td>Well Met</td>
<td>Well Met</td>
</tr>
<tr>
<td>Part 5.</td>
<td>Human Resources</td>
<td>3.07</td>
<td>Well Met</td>
<td>Well Met</td>
</tr>
<tr>
<td>Part 11.</td>
<td>Diversity</td>
<td>3.25</td>
<td>Well Met</td>
<td>Well Met</td>
</tr>
<tr>
<td>Part 10.</td>
<td>Campus and External Relations</td>
<td>3.50</td>
<td>Well Met</td>
<td>Well Met</td>
</tr>
<tr>
<td>Part 1.</td>
<td>Mission</td>
<td>3.56</td>
<td>Well Met</td>
<td>Well Met</td>
</tr>
</tbody>
</table>

**KEY:**

ND = Not Done (0) 0-0.99  
1 = Not Met 1-1.99  
2 = Minimally Met 2-2.99  
3 = Well Met 3-3.99  
4 = Fully Met 4  
NR = Not Rated NR

Step Seven: Disseminating the program review results  
*Ongoing*

Now that the internal and external reviews are completed and the results compiled, the dissemination of these results can begin. The conversations around these results will inform the action planning phase of the process. To begin the dissemination of the program review results a meeting with interested administrators, staff members, and student leaders will be scheduled. The Associate Director will develop a presentation and condensed materials to disseminate during
these informational sessions. These conversations will contribute to the strategic planning phase of the process, which is now formally underway. Ultimately, this internal and external assessment will provide the benchmarks from which to generate an action plan for strengthening and enhancing the University Center program.

Step Eight: Formulating an Action/Strategic Plan

Projected completion fall 2010

Through the assessment process discrepancies were identified between the program and the standards. Action planning designed to overcome program shortcomings and provide program enhancements will occur. The UC will take this opportunity to base the next iteration of the departmental strategic plan on the results of this program review. Thus, the action steps and departmental initiatives will be defined and documented in the next phase of the process. The process will continue to be participatory, allowing various constituents to shape the strategic initiatives and action steps of the UC.

To complete the process, a final summary document that (1) explains the mission, purpose, and philosophy of the program; (2) reviews available data; and (3) recommends specific plans for action will be prepared, vetted through the appropriate stakeholders for endorsement, and adopted as the UC’s 2010 – 2015 Strategic Plan.
Appendix A: Interview Schedule

**Sunday, March 14**

4:30–6:30 p.m.  CAS external review team arrives and briefly tours UC
6:30–8:30 p.m.  Dinner with Director Candy Holt and Associate Director Liz Roosa Millar

**Monday, March 15**

8:30–9:30 a.m.  Breakfast meeting with UC Management Team
9:30–10:30 a.m.  Tour of UC with Assistant Director of Building Services Roger Strobel
10:30–11:30 a.m.  Meeting with UC Director Candy Holt
11:30 a.m.–Noon  Intercept interviews in Atrium (did not occur because of lack of time)
Noon–1:15 p.m.  Lunch meeting with UC Advisory Board and ASUM Student Leaders
1:15–2 p.m.  Meeting with Student Affairs Directors
2–3 p.m.  Meeting with “Valued Customer Clients”
3–4 p.m.  Meeting with Vice President for Student Affairs Teresa Branch and Budget Officers Charlie Thorne and Jim Darcy
4–5 p.m.  Meeting with Provost and Vice President for Academic Affairs Royce Engstrom
5:15–6 p.m.  Reception with ASUM Senators and Agency Reps

**Tuesday, March 16**

9–10 a.m.  Meeting with Building Partners
10–11 a.m.  Meeting with SILD, Marketing and UC Administration Staff
11 a.m.–Noon  Meeting with Building Services, Events Planning, Audio & Lighting, and ShipEx
Noon–1 p.m.  Lunch with representative group of UC student employees
1–2:30 p.m.  Meeting with Director Holt and Associate Director Roosa Millar
Appendix B: Interviewees

**UC Management Team**
- Candy Holt
- Liz Roosa Millar
- Adrianne Donald
- Molly Collins
- Roger Strobel
- Jennifer McMillan
- Shannon Brilz
- Gwen Landquist
- Tyson Mclean

**UC Board and ASUM Executive Officers**
- Miranda Carson
- Bill Muse
- Matt Fennell
- Emily Schembra
- Marlene Hendrickson

**Student Affairs Directors and VPSA**
- Teresa Branch (VPSA)
- Kallie Gilstad (Student Intern, Financial Aid)
- Mick Hanson
- Jed Liston
- Mike Heuring
- Charlie Thorne
- Barbara Seekins
- Jim Darcy
- Effie Koehn
- Byron Drake (for Mark LoParco)

**Valued Customer Clients**
- Karissa Drye (Admissions, Orientation)
- Mika Watanabe-Taylor (DSS)
- Janie Spencer (Continuing Education)
- Kathy Zeiler (President’s Office)
- Betsy Hawkins (Human Resources)
- Brian Lofink (International Programs)
- Jeri Jacobsen (Mansfield Center)

**Vice President for Student Affairs Office**
- Teresa Branch (VPSA)
- Charlie Thorne and Jim Darcy

**Provost’s Office**
- Royce Engstrom (Vice President & Provost for President George Dennison)

**ASUM Senate and Agency Representatives**
- Brian Larson (UC Board, College of Technology)
- Ben Weiss (KBGA Radio Station)
- Marcia Ronck (Child Care)
- Amanda Stovall (ASUM Senator)
- Phoebe Hunter (ASUM Office Manager)

**Building Partners**
- Mary Ellen Farrar (Campus Quick Copy)
- Brenda Hallas (Jus Chill’n)
- Ryan Leisle (Missoula Federal Credit Union)
- Becky Hofstad (Spectral Fusion)
- Bryan Thornton (Bookstore)
- Nina Murch (Food Court)
- Laura Sundstad (Catering)
- Tonya Smith (Dining and University Center)

**Student Involvement, Marketing, and UC Administration**
- Adrianne Donald
- Annette St. Onge
- Michelle Crowe
- Jessica Shontz
- Tina Brown
- Marissa Brewer
- Tyson Mclean
- Mary Lester
- Michael Paine
- June Noel
- Gwen Landquist
- Josh Peters-McBride
- Molly Collins
Building Services, Event Planning, Audio and Lighting, and Shipping Express
Shannon Brilz
Jennifer McMillan
Liz Roosa Millar
Mike Weddle
Fawn Wilder
Carole Haidle
Dale Robertson
Lynn Elsner
Kelly Chadwick
Richard Butler
John Hartman
Greg Garber
Roger McDonald
Walter Wheeler Jr.
Matthew Cragwick

Student Employees
Fawn Wilder (Shipping Express)
Dustin Chessin (Marketing Department)
Ashley Wachtel (Building Services)
Tim Riordan (Game Room)
Lauren Kooistra (Event Planning)
Derek Johndrow (Student Involvement)
Carmine Leighton (Garden Assistant)
Michael Billington (Garden Assistant)
Appendix C: ACUI Role of College Union Statement

The union is the community center of the college, serving students, faculty, staff, alumni and guests. By whatever form or name, a college union is an organization offering a variety of programs, activities, services, and facilities that, when taken together, represent a well-considered plan for the community life of the college.

The union is an integral part of the educational mission of the college.

- As the center of the college community life, the union complements the academic experience through an extensive variety of cultural, educational, social and recreational programs. These programs provide the opportunity to balance course work and free time as cooperative factors in education.
- The union is a student-centered organization that values participatory decision making. Through volunteerism, its boards, committees and student employment, the union offers firsthand experience in citizenship and educates students in leadership, social responsibility and values.
- In all its processes, the union encourages self-directed activity, giving maximum opportunity for self-realization and for growth in individual social competency and group effectiveness.

The union’s goal is the development of persons as well as intellects.

Traditionally considered the “hearthstone” or “living room” of the campus, today’s union is the gathering place of the college. The union provides services and conveniences that members of the college community need in their daily lives and creates an environment for getting to know and understand others through formal and informal associations.

The union serves as a unifying force that honors each individual and values diversity. The union fosters a sense of community that cultivates enduring loyalty to the college.

*Adopted by the Association’s general membership in 1996, this statement is based on The Role of the College Union statement, 1956.*
Appendix D: External Reviewer Bios

Carlos García

Carlos García is currently the director of the University Memorial Center (UMC), the center of campus life at the University of Colorado–Boulder. He joined the University of Colorado in 1997 and was previously director of union services and university housing at the University of Texas–El Paso, an institution he served for 15 years.

As the UMC director, García oversees approximately 110 full-time staff and 275 student employees and an $11.5 million overall annual budget. These responsibilities include the management of the $4 million self-operated food service retail program, campus catering, and contract food vendors. In addition, he oversees the facility’s events scheduling, conference management, events setups, non-academic campus-wide facility scheduling, non-food retail leases, marketing and assessment programs, student activities and involvement programs, student development, the CU GOLD student leadership program, the CU NightRide safety program, and custodial and maintenance of the 263,000-square-foot UMC facility. García oversees small and large capital improvement projects and was responsible for the 2002 $27 million expansion and renovation of the UMC, which earned a Silver LEED-EB rating. He works closely with student government and other student boards and councils to make sure that the facilities, programs, services, and educational opportunities provided by the UMC meet the needs of CU students and the campus community at large.

García is an active member of the National Association of College Auxiliary Services, NACAS-West, and ACUI (Association of College Unions International), and previously served on the ACUI Board of Trustees, as well as on the ACUI Region 12 Leadership Team. He is currently serving as NACAS-West Vice President/President-Elect. He has been involved in international and regional conference planning teams for both ACUI and NACAS. He is also an active member of the Big 12 Conference Union Directors group and was previously a member of the Association of College & University Housing Officers-International (ACUHO-I) as well as the National Association for Campus Activities (NACA).

García received his Bachelor of Arts in Psychology in 1979 and his Master of Arts in Interdisciplinary Studies with an emphasis in Higher Education Administration in 1996, both from the University of Texas–El Paso. He has completed a college union program review for Colorado State University, a food services review for Colorado State University and has consulted at the University of Monterrey–Mexico.

Michael Ellis

Mike Ellis currently serves as the assistant vice president for student affairs and the executive director of the Lory Student Center at Colorado State University. He has direct supervisory responsibility for a $27 million auxiliary enterprise that includes: Campus Activities; the Associated Students of CSU (ASCSU); the Student Leadership, Involvement and Community Engagement Office;
the University Bookstore; Business and Dining Services; and LSC Operations. The Lory Student Center consists of 310,000 square feet and depends upon 115 career staff and more than 450 student and hourly staff for its daily operations. Ellis also assists in the coordination of Division of Student Affairs budgeting activities in excess of approximately $100 million.

Ellis received his Bachelor of Arts degree from the University of California–Irvine, a Master of Arts degree in College Student Personnel Administration from the University of Maryland–College Park, and his Doctor of Education degree in Educational Leadership with a concentration in higher education from the University of Utah. His previous professional experiences include serving as the interim assistant director and coordinator of student programs in the Stamp Student Union at the University of Maryland and director of the Shepherd Union at Weber State University. As an assistant professor in the Student Affairs in Higher Education Graduate Program, Ellis has taught the College Student Personnel Administration course for the past 10 years and is a guest lecturer for the Higher Education Finance, Administration, and College Union courses. Ellis has completed college union program reviews for the University of Wyoming, University of Hartford, University of Colorado–Boulder, University of Texas–San Antonio, and American University.
Appendix I-A: UCAC Internal/Self-Assessment Results

Completed: March 12, 2009

Members:
Candy Holt, Director
Liz Roosa Millar, Associate Director
Adrianne Donald, Assistant Director Marketing and Communications
Roger Strobel, Assistant Director Building Services
Molly Collins, Assistant Director Student Involvement
Jennifer McMillan, Business Manager
Shannon Earley, Conference and Events Manager
Tonya Smith, Special Projects Student

Contributor: Tyson McLean, Greek Life Program Advisor

Introduction

The University Center Assessment Committee (UCAC) collectively rated the UC Program through a participatory and deliberative process. The discussions around individual ratings proved to be deep and productive conversations, which created a shared understanding of where the UC program is now and where we would like it to be. This analysis and interpretation led to the following collective judgment. These results and those reported by the external review team will be used to determine an action plan for improvement (i.e., the 2010 – 2015 Strategic Plan). The strategic planning process is the culminating phase of the program review and the deliverable will be the strategic plan, which will be completed by fall 2010. The next iteration of the UC’s Strategic Plan will continue from the current 2002 – 2007 Strategic Plan. Initiatives from this plan will be analyzed for relevancy and included or revised as appropriate for the new plan. The UCAC and other interested UC staff members will continue the process, which will be guided by Liz Roosa Millar, UC Associate Director.

Part 1: MISSION

The University Center (UC) must incorporate student learning and student development in its mission. The program and service must enhance overall educational experiences. The program and service must develop, record, disseminate, implement, and regularly review its mission and goals. Mission statements must be consistent with the mission and goals of The University of Montana (UM) and with the standards in this document. The program and service must operate as an integral part of UM’s overall mission.
The primary goals of the UC must be to maintain facilities, provide services, and promote programs that are responsive to student developmental needs and to the physical, social, recreational, and continuing education needs of the campus community.

The UC is a center for the campus community and, as such, is an integral part of the University’s educational environment. The UC represents a building, an organization, and a program; it provides services, facilities, and educational and recreational programs that enhance the quality of college life.

Through the work of its staff and various committees the UC can be a "laboratory" where students can learn and practice leadership, programming, management, social responsibility, and interpersonal skills. As a center for the academic community, the UC provides a place for increased interaction and understanding among individuals from diverse backgrounds.

To meet its goals, the UC should provide:

1. food services
2. leisure time and recreational opportunities
3. social, cultural, and intellectual programs
4. continuing education opportunities
5. retail stores
6. service agencies that are responsive to campus needs
7. student leadership development programs and opportunities
8. student development programs
9. student employment

University Center Mission Statement:
The University Center is the heart of The University of Montana. It is a gathering place with an atmosphere that is welcoming, full of activity, and alive with diversity. As a bridge between formal classroom learning and life experience, activities coordinated by the University Center work in harmony with the mission of the University. It provides opportunities to develop leadership skills while enhancing an appreciation for responsibility through active student involvement and employment. The University Center serves the university community by providing information resources; a variety of quality, convenient services; a multitude of cultural programs; educational and entertaining events; and recreational and leisure activities; while offering a place for free expression and creative ideas.

PART 1. MISSION (Criterion Measures)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>The University Center (UC) mission and goals statement is in place.</td>
</tr>
<tr>
<td>1.2</td>
<td>The UC mission and goals statement is periodically reviewed and revised.</td>
</tr>
</tbody>
</table>

RATING: Goals embedded in mission statement.
NOTES: No formalized plan when to review mission.
1.3 The mission and goals are disseminated utilizing multiple medias.

1.4 Student learning, development, and educational experiences are incorporated in the mission statement.

1.5 The UC’s mission is consistent with the University’s.

**UM MISSION STATEMENT**

The University of Montana-Missoula pursues academic excellence as indicated by the quality of curriculum and instruction, student performance, and faculty professional accomplishments. The University accomplishes this mission, in part, by providing unique educational experiences through the integration of the liberal arts, graduate study, and professional training with international and interdisciplinary emphases. Through its graduates, the University also seeks to educate competent and humane professionals and informed, ethical, and engaged citizens of local and global communities. Through its programs and the activities of faculty, staff, and students, The University of Montana-Missoula provides basic and applied research, technology transfer, cultural outreach, and service benefiting the local community, region, state, nation and the world.

1.6 The mission is consistent with that of the Division of Student Affairs.

**SA MISSION**

Our mission is to facilitate student learning by providing high quality programs, services, and developmental opportunities, while fostering an inclusive campus community in support of the educational mission of The University of Montana.

1.7 The UC’s mission is consistent with the CAS standards.

1.8 The UC program (services, facilities, and activities) functions as an integral part of The University of Montana’s overall mission.

1.9 The primary goals are to maintain facilities, provide

**Generated ideas to do better.**

Could define better/state more clearly.

**Not evident in the University’s mission statement, but is how we function.**
services, and promote programs/activities that are responsive to student development needs and to the physical, social, recreational, and continuing needs of the campus community.

\[ \text{Mean} = 3.56 \text{ Well Met} \]

**Part 2: PROGRAM**

The formal education of students consists of the curriculum and the co-curriculum, and must promote student learning and development that is purposeful and holistic. The University Center (UC) must identify relevant and desirable student learning and development outcomes and provide programs and services that encourage the achievement of those outcomes.

Relevant and desirable outcomes include: intellectual growth, effective communication, realistic self-appraisal, enhanced self-esteem, clarified values, career choices, leadership development, healthy behaviors, meaningful interpersonal relationships, independence, collaboration, social responsibility, satisfying and productive lifestyles, appreciation of diversity, spiritual awareness, and achievement of personal and educational goals.

The UC must provide evidence of its impact on the achievement of student learning and development outcomes. The table below offers examples of evidence of achievement of student learning and development.

<table>
<thead>
<tr>
<th>Relevant and desirable student learning and development outcomes</th>
<th>Examples of Evidence of Achievement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Responsibility</td>
<td>Understands and participates in relevant governance systems; Understands, abides by, and participates in the development, maintenance, and/or orderly change of community, social, and legal standards or norms; Appropriately challenges the unfair, unjust, or uncivil behavior of other individuals or groups; Participates in service/volunteer activities</td>
</tr>
<tr>
<td>Leadership Development</td>
<td>Articulates leadership philosophy or style; Serves effectively in a leadership position in a student organization; Comprehends the dynamics of a group; Exhibits democratic principles as a leader; Exhibits ability to visualize a group purpose and desired outcomes</td>
</tr>
<tr>
<td>Collaboration</td>
<td>Works cooperatively with others; Seeks the involvement of others; Seeks feedback from others; Contributes to achievement of a group goal; Exhibits effective listening skills</td>
</tr>
<tr>
<td>Satisfying and</td>
<td>Achieves balance between education, work and leisure time; Articulates</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>--------------------------------</td>
<td>--------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Productive Lifestyle</strong></td>
<td>and meets goals for work, leisure and education; Overcomes obstacles that hamper goal achievement; Functions on the basis of personal identity, ethical, spiritual and moral values; Articulates long-term goals and objectives</td>
</tr>
<tr>
<td><strong>Effective Communication</strong></td>
<td>Writes and speaks coherently and effectively; Writes and speaks after reflection; Able to influence others through writing, speaking or artistic expression; Effectively articulates abstract ideas; Uses appropriate syntax; Makes presentations or gives performances</td>
</tr>
<tr>
<td><strong>Meaningful Interpersonal Relationships</strong></td>
<td>Develops and maintains satisfying interpersonal relationships; Establishes mutually rewarding relationships with friends and colleagues; Listens to and considers others’ points of view; Treats others with respect</td>
</tr>
<tr>
<td><strong>Enhanced Self-Esteem</strong></td>
<td>Shows self-respect and respect for others; Initiates actions toward achievement of goals; Takes reasonable risks; Demonstrates assertive behavior; Functions without need for constant reassurance from others</td>
</tr>
<tr>
<td><strong>Independence</strong></td>
<td>Exhibits self-reliant behaviors; Functions autonomously; Exhibits ability to function interdependently; Accepts supervision as needed; Manages time effectively</td>
</tr>
<tr>
<td><strong>Realistic Self-Appraisal</strong></td>
<td>Articulates personal skills and abilities; Makes decisions and acts in congruence with personal values; Acknowledges personal strengths and weaknesses; Articulates rationale for personal behavior; Seeks feedback from others; Learns from past experiences</td>
</tr>
<tr>
<td><strong>Clarified Values</strong></td>
<td>Articulates personal values; Acts in congruence with personal values; Makes decisions that reflect personal values; Demonstrates willingness to scrutinize personal beliefs and values; Identifies personal, work and lifestyle values and explains how they influence decision-making</td>
</tr>
<tr>
<td><strong>Appreciating Diversity</strong></td>
<td>Understands one’s own identity and culture. Seeks involvement with people different from oneself; Seeks involvement in diverse interests; Articulates the advantages and challenges of a diverse society; Challenges appropriately abusive use of stereotypes by others; Understands the impact of diversity on one’s own society</td>
</tr>
<tr>
<td><strong>Intellectual Growth</strong></td>
<td>Produces personal and educational goal statements; Employs critical thinking in problem solving; Uses complex information from a variety of sources including personal experience and observation to form a decision or opinion; Obtains a degree; Applies previously understood information and concepts to a new situation or setting; Expresses appreciation for literature, the fine arts, mathematics, sciences, and social sciences</td>
</tr>
<tr>
<td><strong>Personal and Educational Goals</strong></td>
<td>Sets, articulates, and pursues individual goals; Articulate personal and educational goals and objectives; Uses personal and educational goals to guide decisions; Understands the effect of one’s personal and educational goals on others</td>
</tr>
<tr>
<td>Career Choices</td>
<td>Articulate career choices based on assessment of interests, values, skills and abilities; Documents knowledge, skills and accomplishments resulting from formal education, work experience, community service and volunteer experiences; Makes the connections between classroom and out-of-classroom learning; Can construct a resume with clear job objectives and evidence of related knowledge, skills and accomplishments; Articulates the characteristics of a preferred work environment; Comprehends the world of work; Takes steps to initiate a job search or seek advanced education</td>
</tr>
<tr>
<td>Healthy Behavior</td>
<td>Chooses behaviors and environments that promote health and reduce risk; Articulate the relationship between health and wellness and accomplishing life long goals; Exhibits behaviors that advance a healthy community.</td>
</tr>
<tr>
<td>Spiritual Awareness</td>
<td>Develops and articulates personal belief system; Understands roles of spirituality in personal and group values and behaviors (<em>important to differentiate from “religion”</em>)</td>
</tr>
</tbody>
</table>

**UC programs must be (a) intentional, (b) coherent, (c) based on theories and knowledge of learning and human development, (d) reflective of developmental and demographic profiles of the student population, and (e) responsive to needs of individuals, special populations, and communities.**

The **UC activities and services must be appropriate to the size and diversity of the campus and must provide opportunities for student, staff, and faculty participation, interaction, and collaboration on policy establishment, facility operation, and program activities. The UC must strive to enhance intellectual and behavioral learning.**

The program of the UC includes services, facilities, and activity events. The UC should provide, in varying degrees, food services, meeting rooms, student and administrative offices, an information-reception center, lounge(s), a merchandise counter or store, a lobby, public telephones, recreation facilities, and rest rooms. Additional services and facilities provided by most unions include music listening rooms, table game rooms, space for exhibits, parking facilities, and conference rooms.

The UC should include a balanced variety of activities, such as art, performing arts, music, cinematic arts, games and tournaments, outdoor recreation, lecture and literary events, crafts and hobbies, social and dance events, and activities addressing social responsibility and human relations. Program events should be diverse reflecting the richness of the community's cultures.
# PART 2. PROGRAM (Criterion Measures)

<table>
<thead>
<tr>
<th></th>
<th>RATING</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1 The University Center (UC) program (i.e., services, facilities, and activities) promotes student learning and development that is purposeful.</td>
<td>ND 1 2 3 4 NR</td>
<td>Evidence does not support.</td>
</tr>
<tr>
<td>2.2 The UC program (i.e., services, facilities, and activities) promotes student learning and development that is holistic/comprehensive.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>2.3 The UC program has identified student learning and development outcomes that are relevant to its purpose.</td>
<td>ND 1 2 3 4 NR</td>
<td>Only in student involvement (activities) and student employment program, not facilities and services.</td>
</tr>
<tr>
<td>2.4 The UC program provides students with opportunities designed to encourage achievement of the identified outcomes.</td>
<td>ND 1 2 3 4 NR</td>
<td>We definitely have opportunities for improvement in this area. There is evidence that we offer programs that may address these domains. However, we do not operate from established learning outcomes; outcomes based from theory. We do not deliberately use student learning and development to guide the work we do (we plan from instinct and experience). Further, we do not assess, let alone assess whether learning</td>
</tr>
<tr>
<td>2.5 The UC program provides evidence of its impact on the achievement of student learning and development outcomes in the domains checked below <em>(Note: student learning and/or developmental outcomes are listed in the spaces provided)</em>.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>2.5.1 Intellectual Growth</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>2.5.2 Effective Communication</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>2.5.3 Enhanced Self-Esteem</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>2.5.4 Realistic Self-Appraisal</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>2.5.5 Clarified Values</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>2.5.6 Career Choices</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>2.5.7 Leadership Development</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>2.5.8 Healthy Behavior</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>2.5.9 Meaningful Interpersonal Relationships</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>2.5.10 Independence</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>2.5.11 Collaboration</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>2.5.12 Social Responsibility</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>2.5.13 Satisfying and Productive Lifestyle</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>2.5.14 Appreciate Diversity</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
</tbody>
</table>
Part 3: LEADERSHIP

Effective and ethical leadership is essential to the success of all organizations. Institutions must appoint, position, and empower leaders within the administrative structure to accomplish stated missions. Leaders at various levels must be selected on the basis of formal education and training, relevant work experience, personal skills and competencies, relevant professional credentials, as well as potential for promoting learning and development in students, applying effective practices to educational processes, and enhancing institutional effectiveness. Institutions must determine expectations of accountability for leaders and fairly assess their performance. The University Center (UC) Senior Management Team must exercise authority over resources for which they are responsible to achieve their respective missions.

The UC Senior Management Team must:
- articulate a vision for their organization
- set goals and objectives based on the needs and capabilities of the population served
- promote student learning and development
- prescribe and practice ethical behavior
- recruit, select, supervise, and develop others in the organization
• manage financial resources
• coordinate human resources
• plan, budget for, and evaluate personnel and programs
• apply effective practices to educational and administrative processes
• communicate effectively
• initiate collaborative interaction between individuals and agencies that possess legitimate concerns and interests in the functional area

The Senior Management Team must identify and find means to address individual, organizational, or environmental conditions that inhibit goal achievement. They must promote campus environments that result in multiple opportunities for student learning and development.

The Senior Management Team must continuously improve programs and services in response to changing needs of students and other constituents, and evolving institutional priorities.

The UC Senior Management Team must promote campus environments that result in multiple opportunities for student learning and development.

The UC Senior Management must continuously improve programs and services in response to changing needs of students and other constituents and evolving institutional priorities.

The UC strives to operate under a shared leadership model. In order to meet this goal these five factors should be met: 1) members of the Senior Management Team have equal power/authority i.e., there is a balance of power among UC leaders; 2) members of the Senior Management Team have a shared understanding of the ultimate goals of the UC i.e., there is a shared sense of purpose; 3) members of the Senior Management Team share the responsibility and are accountable for the work of the UC i.e., each member takes an active role and is accountable for completing their individual contribution; 4) each person on the Senior Management Team brings with them skills and ideas that are valuable; these differences are recognized and embraced by the members of the Team and; 5) the Senior Management Team works together/collaboratively in all situations, no matter how complex or difficult.

What positions within the UC are members of the Senior Management Team?

Director
Associate Director
Assistant Director of Marketing and Communications
Assistant Director of Building Services
Assistant Director of Student Involvement and Leadership Development
Business Manager
### PART 3. LEADERSHIP (Criterion Measures)

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<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>3.1 The University of Montana has selected, positioned, and empowered a program director.</td>
<td>RATING</td>
<td>NOTES</td>
</tr>
<tr>
<td>3.2 Senior Management Team members are qualified on the basis of education, experience, competence, and professional credentials established by the following organizations:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.2a. UM Human Resource position requirements</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>3.2b. ACUI core competencies</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>3.2c. CAS standards for Student Affairs professional preparation</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>3.3 Senior Management Team members apply effective practices that promote student learning and institutional effectiveness.</td>
<td>ND 1 2 3 4 NR</td>
<td>Informally, not always documented.</td>
</tr>
<tr>
<td>3.4 Clearly defined accountability expectations are in place for the Management Team.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>3.5 The performance of individual members on the Senior Management Team is fairly assessed on a regular basis.</td>
<td>ND 1 2 3 4 NR</td>
<td>Typically, evaluated annually, Director is 1 year behind.</td>
</tr>
<tr>
<td>3.6 The Senior Management Team exercises authority over program resources and uses them effectively.</td>
<td>ND 1 2 3 4 NR</td>
<td>Not documented.</td>
</tr>
<tr>
<td>3.7 The Senior Management Team:</td>
<td>ND 1 2 3 4 NR</td>
<td>Evidence weak, although claim to practice it. Inconsistent, based on area supervisor standards.</td>
</tr>
<tr>
<td>3.7a. articulates an organizational vision and goals that include promotion of student learning and development based on the needs of the population served.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>3.7b. prescribes and practices appropriate ethical behavior.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>3.7c. recruits, selects, supervises, instructs, and coordinates staff members.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>3.7d. manages fiscal, physical, and human resources effectively.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>3.7e. applies effective practices, based on their respective educational, experiential, and professional credentials, to the educational and administrative processes within</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
</tbody>
</table>
3.8 The Senior Management Team communicates effectively and initiates collaborations with individuals and agencies to enhance program functions.

3.9 The Senior Management Team deals effectively with individuals and environmental conditions that inhibit goal achievement.

3.10 The Senior Management Team encourages campus environments that promote multiple opportunities for student learning and development.

3.11 The Senior Management Team promotes campus environments that result in multiple opportunities for student learning and development.

3.12 The Senior Management Team strives to improve the UC program (activities, facilities, and services) in response to evolving student needs and institutional priorities.

3.13 The Senior Management Team continuously improves the UC program (activities, facilities, and services) in response to changing needs of students and other constituents, and evolving institutional priorities.

3.14 **SHARED LEADERSHIP** (added by UCAC)

3.14a. Members of the Senior Management Team have equal power/authority i.e., there is a balance of power among UC leaders.

3.14b. Members of the Senior Management Team have a shared understanding of the ultimate goals of the UC i.e., there is a shared sense of purpose.

3.14c. Members of the Senior Management Team share the responsibility and are accountable for the work of the UC i.e., each member takes an active role and is accountable for completing their individual contribution.

3.14d. Each person on the Senior Management Team brings with them skills and ideas that are valuable; these differences

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</thead>
<tbody>
<tr>
<td>ND</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>NR</td>
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</table>

Strong evidence for facilities, weaker for activities and services.

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</thead>
<tbody>
<tr>
<td>ND</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>NR</td>
<td></td>
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</tr>
</tbody>
</table>

Ideas of new people not embraced and
Part 4: ORGANIZATION and MANAGEMENT

Guided by an overarching intent to ensure student learning and development, UC programs and services must be structured purposefully and managed effectively to achieve stated goals. Evidence of appropriate structure must include current and accessible policies and procedures, written performance expectations for all employees, functional workflow graphics or organizational charts, and clearly stated service delivery expectations.

Evidence of effective management must include use of comprehensive and accurate information for decisions, clear sources and channels of authority, effective communication practices, decision-making and conflict resolution procedures, responsiveness to changing conditions, accountability and evaluation systems, and recognition and reward processes. The UC must provide channels within the organization for regular review of administrative policies and procedures.

The UC must be organized to maintain its physical plant, to provide for cultural, intellectual, and recreational programming, to operate its business enterprises, and to deliver successfully the services inherent in the UC’s mission.

A variety of facilities, programs, and services may be incorporated within the building and operation. These include: food service; store and other revenue producing services; leisure time activities; social, cultural, and intellectual activities; building operations; and continuing education.

<table>
<thead>
<tr>
<th>PART 4: ORGANIZATION and MANAGEMENT</th>
<th>RATING</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1 The UC is structured purposefully and managed effectively.</td>
<td>ND 1 2 3 4 NR</td>
<td>more vocal people overpower</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Not in all situations, but come together when necessary.</td>
</tr>
<tr>
<td>4.2 Written policies, procedures, performance expectations, workflow graphics, and clearly stated delivery expectations are in place.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>4.3 Effective management practice exists that includes access to and use of relevant data, clear channels of authority, and viable communications, accountability, and evaluation systems.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
</tbody>
</table>
4.4 Channels are in place for regular review of administrative policies and procedures.

4.5 The UC is organized to maintain its physical plant.

4.6 The UC provides for cultural, intellectual, and recreational programming according to its mission.

4.7 The UC operates business enterprises and delivers services according to its mission.

**Mean = 3.14 Well Met**

---

**Part 5: HUMAN RESOURCES**

The University Center (UC) must be staffed adequately by individuals qualified to accomplish its mission and goals. Within established guidelines of the University, programs and services must establish procedures for staff selection, training, and evaluation; set expectations for supervision, and provide appropriate professional development opportunities. The UC must strive to improve the professional competence and skills of all personnel it employs.

Staff should include persons providing the necessary professional leadership to assume responsibility for the entire union as well as for specific programs. Specific aspects of the UC’s mission for which staff should be assigned include business operations (e.g., operations, program activities, cultural, recreational, theater, and arts and crafts) and special events.

Desirable qualities of staff members should include: (a) knowledge of and ability to use management principles, including the effective management of volunteers; (b) skills in assessment, planning, training, and evaluation; (c) interpersonal skills; (d) technical skills; (e) understanding of college union philosophy; (f) commitment to institutional mission; and (g) understanding of, and the ability to apply student development theory.

Professional staff members must hold an earned graduate degree in a field relevant to the position they hold or must possess an appropriate combination of educational credentials and related work experience.

Degree or credential-seeking interns must be qualified by enrollment in an appropriate field of study and by relevant experience. These individuals must be trained and supervised adequately by professional staff members holding educational credentials and related work experience appropriate for supervision.

Graduate students pursuing advanced degrees in student development, business administration, higher education institutional management, and recreation are among those to whom an internship
or practicum in the UC can be valuable. Such experiences should provide a variety of opportunities within the UC operation. Graduate assistantships also may allow persons pursuing careers in specific areas of the college union field to expand their expertise. Graduate students frequently serve as program advisors or assist operations, recreation or other department supervisors while pursuing advanced degrees. Others such as paraprofessional staff and volunteers may fulfill specific needs. The UC should utilize volunteers in a manner consistent with its mission.

**Student employees and volunteers must be carefully selected, trained, supervised, and evaluated. They must be trained on how and when to refer those in need of assistance to qualified staff members and have access to a supervisor for assistance in making these judgments. Student employees and volunteers must be provided clear and precise job descriptions, pre-service training based on assessed needs, and continuing staff development.**

Student employees and volunteers may be an important part of the UC’s operation. Their work experience can be an important part of their educational experience as well as a source of income. A thorough training program should be provided for part-time student helpers and volunteers and, depending on their assigned duties, might include leadership training, group facilitation skills, and communication skills. Volunteers should be adequately supervised and evaluated.

**The UC must have technical and support staff members adequate to accomplish its mission. Staff members must be technologically proficient and qualified to perform their job functions, be knowledgeable of ethical and legal uses of technology, and have access to training. The level of staffing and workloads must be adequate and appropriate for program and service demands.**

There should be adequate technical and clerical personnel to provide the services and maintain the facilities of the UC. Included may be cooks, dishwashers, projectionists, stage hands, maintenance personnel, secretaries, bookkeepers, typists, attendants, receptionists, housekeepers, scheduling clerks, sales clerks, and cashiers.

**Salary levels and fringe benefits for all staff members must be commensurate with those for comparable positions within the University, in similar institutions, and in the relevant geographic area.**

The UC must institute hiring and promotion practices that are fair, inclusive, and non-discriminatory. Programs and services must employ a diverse staff to provide readily identifiable role models for students and to enrich the campus community.

The UC must create and maintain position descriptions for all staff members and provide regular performance planning and appraisals.

The UC must have a system for regular staff evaluation and must provide access to continuing education and professional development opportunities, including in-service training programs and participation in professional conferences and workshops.
<table>
<thead>
<tr>
<th>PART 5. HUMAN RESOURCES  (Criterion Measures)</th>
<th>RATING</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.1 The University Center (UC) is staffed adequately with personnel qualified to accomplish its mission.</td>
<td>ND 1 2 3 4 NR</td>
<td>Limited due to lack of resources.</td>
</tr>
<tr>
<td>5.2 Procedures are in place for staff selection, training, evaluation; supervision, and professional development opportunities.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>5.3 The UC strives to improve the professional competence and skills of all staff members.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>5.4 Professional staff members hold either a relevant graduate degree or possess an appropriate combination of formal education and related work experience.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>5.5 Degree or credential-seeking interns are qualified by enrollment in an appropriate field of study and by relevant experience and are trained and supervised by professional staff members with appropriate credentials and work experience.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>5.6 Student employees and volunteers are carefully selected, trained, supervised, and evaluated and have access to a qualified supervisor for guidance when exposed to situations beyond their training.</td>
<td>ND 1 2 3 4 NR</td>
<td>Evening and weekend staff members do not always have access to supervisor for guidance.</td>
</tr>
<tr>
<td>5.7 Student employees and volunteers are provided precise job descriptions, pre-service training, and continuing staff development.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>5.8 Technologically trained and proficient staff members, who are knowledgeable of ethical and legal uses of technology, are in place to carry out essential program functions.</td>
<td>ND 1 2 3 4 NR</td>
<td>UM inconsistent, so is not a departmental priority.</td>
</tr>
<tr>
<td>5.9 Staffing and workload levels are adequate and appropriate to meet the demands placed on the UC by students and other constituents.</td>
<td>ND 1 2 3 4 NR</td>
<td>Compensatory and overtime indicate no.</td>
</tr>
<tr>
<td>5.10 Staff member compensation is commensurate with those in comparable positions in comparable institutions and situations in the relevant geographical region.</td>
<td>ND 1 2 3 4 NR</td>
<td>Deficiency of UM and State, not just UC; UM aims at paying within 80th percentile.</td>
</tr>
</tbody>
</table>
5.11 Hiring and promotion practices are fair, inclusive, and non-discriminatory.

5.12 A diverse program staff is in place that provides readily identifiable role models for students.

5.13 Position descriptions for all staff members are in place and used for performance appraisal and planning purposes.

5.14 The UC has a system for regular staff evaluations for:
   5.14a student employees
   5.14b permanent employees

5.15 The UC provides staff members with continuing education and professional development opportunities including in-service programs and professional conferences and workshops.

\text{ Mean = 3.07 Well Met }
6.2 Funding priorities are determined within the context of program mission, student needs, and available fiscal resources.

6.3 The UC demonstrates fiscal responsibility and cost effectiveness consistent with University protocols.

6.4 The University considers various methods and sources of financial support including, but not limited to: income from sales, services, and rentals; student activities or program fees; fees for operation or debt service; direct institutional support (e.g., administrative off-set).

\[ \text{MEAN } = 3.25 \text{ WELL MET} \]

**Part 7: FACILITIES, TECHNOLOGY, and EQUIPMENT**

The University Center (UC) must have adequate, suitably located facilities, adequate technology, and equipment to support its mission and goals efficiently and effectively. Facilities, technology, and equipment must be evaluated regularly and be in compliance with relevant federal, state, provincial, and local requirements to provide for access, health, safety, and security.

The physical plant should be proportional in size to the campus population. Generally a college union should contain approximately 10 square feet of gross space for each student enrolled. Smaller colleges may require more square feet per student; large colleges may require less. Also to be considered is the nature of the student body. Colleges with a large number of commuter and/or part time students or members of a special population might adjust facility requirements accordingly.

**PART 7. FACILITIES, TECHNOLOGY, and EQUIPMENT**

<table>
<thead>
<tr>
<th>7.1 The program has adequate, suitably located facilities, technology, and equipment to support its mission.</th>
<th>RATING</th>
<th>NOTES</th>
</tr>
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<tbody>
<tr>
<td>ND 1 2 B 4 NR</td>
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</table>

<table>
<thead>
<tr>
<th>7.2 Program facilities, technology, and equipment are evaluated regularly.</th>
<th>RATING</th>
<th>NOTES</th>
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</thead>
<tbody>
<tr>
<td>ND 1 2 B 4 NR</td>
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</table>

<table>
<thead>
<tr>
<th>7.3 Facilities, technology, and equipment are in compliance with relevant legal and institutional requirements that ensure access, health, safety, and security of students and other users.</th>
<th>RATING</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>ND 1 2 B 4 NR</td>
<td></td>
<td></td>
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</tbody>
</table>

\[ \text{MEAN } = 3.00 \text{ WELL MET} \]

Currently undergoing Internal Controls Assessment.
Part 8: LEGAL RESPONSIBILITIES

Staff members must be knowledgeable about and responsive to laws and regulations that relate to their respective responsibilities. Staff members must inform users of programs and services and officials, as appropriate, of legal obligations and limitations including constitutional, statutory, regulatory, and case law; mandatory laws and orders emanating from federal, state/provincial and local governments; and the institution’s policies.

Staff members must use reasonable and informed practices to limit the liability exposure of the institution, its officers, employees, and agents. Staff members must be informed about institutional policies regarding personal liability and related insurance coverage options.

The University must provide access to legal advice for staff members as needed to carry out assigned responsibilities.

The University must inform staff and students in a timely and systematic fashion about extraordinary or changing legal obligations and potential liabilities.

<table>
<thead>
<tr>
<th>PART 8. LEGAL RESPONSIBILITIES (Criterion Measures)</th>
<th>RATING</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.1 UC staff members are knowledgeable about and responsive to laws and regulations relevant to their respective responsibilities.</td>
<td>ND 1 2 4 NR</td>
<td>Internal controls review may tease these out.</td>
</tr>
<tr>
<td>8.2 Staff members inform users and officials of legal obligations and limitations associated with implementing the program.</td>
<td>ND 1 2 4 NR</td>
<td>Not all staff think in terms of liability and risk...yet.</td>
</tr>
<tr>
<td>8.3 Staff members use informed practice to limit the liability exposure of the University and its personnel.</td>
<td>ND 1 2 4 NR</td>
<td></td>
</tr>
<tr>
<td>8.4 Staff members are informed about University policies regarding personal liability and related insurance coverage options.</td>
<td>ND 2 3 4 NR</td>
<td>UM’s legal counsel does not sleep!</td>
</tr>
<tr>
<td>8.5 Legal advice is available to staff members as needed to carry out assigned responsibilities.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>8.6 Both staff and students are informed in systematic fashion about extraordinary or changing legal obligations and potential liabilities.</td>
<td>ND 1 2 3 4 NR</td>
<td>Not informed in the first place, but do hear of changes.</td>
</tr>
</tbody>
</table>

**Mean = 2.67 Minimally Met**
Part 9: EQUITY and ACCESS

University Center (UC) staff members must ensure that services and programs are provided on a fair and equitable basis. Facilities, programs, and services must be accessible. Hours of operation and delivery of and access to programs and services must be responsive to the needs of all students and other constituents. Each program and service must adhere to the spirit and intent of equal opportunity laws.

The UC activities/programs, services, and facility must be open and readily accessible to all students and must not discriminate except where sanctioned by law and institutional policy. Discrimination must be avoided on the bases of age; color; creed; cultural heritage; disability; ethnicity; gender identity; nationality; political affiliation; religious affiliation; sex; sexual orientation; or social, economic, marital, or veteran status. Consistent with its mission and goals, the University Center must take affirmative action to remedy significant imbalances in student participation and staffing patterns.

As the demographic profiles of campuses change and new instructional delivery methods are introduced, institutions must recognize the needs of students who participate in distance learning for access to programs and services offered on campus. Institutions must provide appropriate services in ways that are accessible to distance learners and assist them in identifying and gaining access to other appropriate services in their geographic region.

<table>
<thead>
<tr>
<th>PART 9. EQUITY AND ACCESS (Criterion Measures)</th>
<th>RATING</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.1 All activities/programs, facility spaces, and services are provided on a fair and equitable basis.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>9.2 All activities/programs, facility spaces, and services are accessible to prospective users.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>9.3 UC operations and delivery are responsive to the needs of all students and other users.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>9.4 All services adhere to the spirit and intent of equal opportunity laws.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>9.5 UC policies and practices do not discriminate against any potential users.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>9.6 The UC acts to remedy imbalances in student participation and staffing.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>9.7 Services are conveniently available and accessible to distance learner students or arrangements have been made.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
</tbody>
</table>
made for students to have access to related services in their geographical area.

\[ \text{MEAN} = 2.14 \text{ MINIMALLY MET} \]

**Part 10: CAMPUS and EXTERNAL RELATIONS**

The University Center (UC) must establish, maintain, and promote effective relations with relevant individuals, campus offices, and external agencies.

The success of the UC is dependent on the maintenance of good relationships with students, faculty, administrators, alumni, the community at large, contractors, and support agencies. Staff members must encourage participation in UC programs by relevant groups.

Each member of the campus community is a potential patron of the UC’s services, a potential member of the UC organization, including its governing board, and a potential participant in the UC's programming.

Students are the principle constituency of the UC. Much of the vitality, variety, and spontaneity of the UC's activities stem from student boards and committees.

Student government and other groups should have ongoing involvement with the UC's programs, services, and operations.

Student publications also may be important for communicating information about UC programs. Communications with students should be continuous.

The involvement of faculty, staff, and alumni is essential to the vitality of UC programs and services.

Faculty members should be involved in policy-making processes and program efforts of the UC.

Alumni are potential sources of support and involvement financial and otherwise.

The administrative staff of the University is important to day-to-day operations of the UC. In some instances important UC services such as food, cleaning, repairs, bookstore, or accounting may be administered by a department of the college rather than by UC staff; relations with those department heads and their representatives must be cultivated carefully. The support of other student affairs agencies as well as chief campus officials is important.

Technical and clerical staff members can be important as customers, members of the various committees, and members of the governing board.
Positive relations with lessees and contractors (e.g., barbershops, boutiques, food services, bookstores) require close and continuing attention.

### PART 10. CAMPUS and EXTERNAL RELATIONS

<table>
<thead>
<tr>
<th>10.1</th>
<th>The UC has established, maintained, and promoted effective relations with relevant campus and external individuals and agencies (students, faculty, administrators, alumni, the community at large, contractors, support agencies, etc.).</th>
</tr>
</thead>
</table>

| 10.2 | Staff members encourage participation in UC programs by relevant groups. |

**Mean = 3.50 Well Met**

#### Part 11: DIVERSITY

Within the context of each institution's unique mission, diversity enriches the community and enhances the collegiate experience for all; therefore, programs and services must nurture environments where commonalities and differences among people are recognized and honored.

The University Center (UC) must promote educational experiences that are characterized by open and continuous communication that deepens understanding of one's own identity, culture, and heritage, and that of others. Programs and services must educate and promote respect about commonalities and differences in their historical and cultural contexts.

The UC must address the characteristics and needs of a diverse population when establishing and implementing policies and procedures.

### PART 11. DIVERSITY (Criterion Measures)

<table>
<thead>
<tr>
<th>11.1</th>
<th>The UC nurtures environments wherein commonalities and differences among people are recognized and honored.</th>
</tr>
</thead>
</table>

| 11.2 | The UC promotes experiences characterized by open communication that deepen understanding of identity, culture, and heritage. |

| 11.3 | The UC promotes respect for commonalities and differences in historical and cultural contexts. |

| 11.4 | The UC addresses characteristics and needs of diverse populations when establishing and implementing policies and procedures. |

**Mean = 3.25 Well Met**

### NOTES
Mostly in Student Involvement, not throughout program.
Part 12: ETHICS

All persons involved in the delivery of programs and services in the University Center (UC) must adhere to the highest principles of ethical behavior. The UC must develop or adopt and implement appropriate statements of ethical practice. The UC must publish these statements and ensure their periodic review by relevant constituencies.

Staff members must ensure that privacy and confidentiality are maintained with respect to all communications and records to the extent that such records are protected under the law and appropriate statements of ethical practice. Information contained in students’ education records must not be disclosed without written consent except as allowed by relevant laws and institutional policies. Staff members must disclose to appropriate authorities information judged to be of an emergency nature, especially when the safety of the individual or others is involved, or when otherwise required by University policy or relevant law.

All staff members must be aware of and comply with the provisions contained in the University's human subjects research policy and in other relevant institutional policies addressing ethical practices and confidentiality of research data concerning individuals.

Staff members must recognize and avoid personal conflict of interest or appearance thereof in their transactions with students and others.

Staff members must strive to ensure the fair, objective, and impartial treatment of all persons with whom they deal. Staff members must not participate in nor condone any form of harassment that demeans persons or creates an intimidating, hostile, or offensive campus environment.

When handling University funds, all staff members must ensure that such funds are managed in accordance with established and responsible accounting procedures and the fiscal policies or processes of the institution.

Staff members must perform their duties within the limits of their training, expertise, and competence. When these limits are exceeded, individuals in need of further assistance must be referred to persons possessing appropriate qualifications.

Staff members must use suitable means to confront and otherwise hold accountable other staff members who exhibit unethical behavior.

Staff members must be knowledgeable about and practice ethical behavior in the use of technology.
<table>
<thead>
<tr>
<th>PART 12. ETHICS (Criterion Measures)</th>
<th>RATING</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.1 All University Center (UC) staff members adhere to the principles of ethical behavior adopted, published, and disseminated by the UC to guide ethical practice.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>12.2 The UC has a written statement of ethical practice that is reviewed periodically.</td>
<td>ND 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>12.3 Privacy and confidentiality are maintained with respect to all communications and records to the extent protected under the law and program statements of ethical practice.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>12.4 Information contained in students’ education records is never disclosed without written consent except as allowed by law and University policy.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>12.5 Information judged to be of an emergency nature when an individual’s safety or that of others is involved is disclosed to appropriate authorities.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>12.6A. All staff members comply with the University’s human subjects research and other policies addressing confidentiality of research data concerning individuals.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>12.6 Staff members avoid personal conflicts of interest or appearance thereof in transactions with students and others.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>12.7 Staff members strive to ensure the fair, objective, and impartial treatment of all persons with whom they deal and do not condone or participate in behavior that demeans persons or creates an intimidating, hostile, or offensive campus environment.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>12.8 Staff members ensure that funds are managed in accordance with established University fiscal accounting procedures, policies, and processes.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
<tr>
<td>12.9 All staff members perform assigned duties within the limits of training, expertise, and competence and when these limits are exceeded referrals are made to persons possessing appropriate qualifications.</td>
<td>ND 1 2 3 4 NR</td>
<td></td>
</tr>
</tbody>
</table>

NOTES

Few have access to records; those that do are not fully trained.

The appropriate procedures are not communicated well to all staff.

No evidence of compliance.

Weak evidence; but difficult to document besides performance reviews.
12.10 Staff members confront and otherwise hold accountable others who exhibit unethical behavior.

12.11 Staff members practice ethical behavior in the use of technology.

**Mean = 2.25 Minimally Met**

**Part 13: ASSESSMENT and EVALUATION**

The University Center (UC) must conduct regular assessment and evaluations. The UC must employ effective qualitative and quantitative methodologies as appropriate, to determine whether and to what degree the stated mission, goals, and student learning and development outcomes are being met. The process must employ sufficient and sound assessment measures to ensure comprehensiveness. Data collected must include responses from students and other affected constituencies. The UC must evaluate periodically how well it complements and enhances the University’s stated mission and educational effectiveness. Results of these evaluations must be used in revising and improving programs and services and in recognizing staff performance. Evaluation may include goal-related progress on such considerations as attendance at programs, cash flow, appearance of facilities, and vitality of volunteer groups. Periodic reports, statistically valid research, and outside reviews should be utilized.

**PART 13. ASSESSMENT AND EVALUATION**

<table>
<thead>
<tr>
<th>13.1 The UC conducts regular assessment and evaluations and employs both qualitative and quantitative methodologies to determine how effectively the mission and student learning and development outcomes are being met.</th>
<th>RATING</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>ND 1 2 3 4 NR</td>
<td><strong>Mean = 1.40 Minimally Met</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>13.2 The assessment process employs measures that ensure comprehensiveness and data collected include responses from students and other affected constituencies.</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ND 1 2 3 4 NR</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>13.3 The program evaluates periodically how well it complements and enhances the University’s stated mission and educational effectiveness.</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ND 2 3 4 NR</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>13.4 Results of these evaluations are used to revise and improve the UC program including facilities, services, and activities/programs.</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ND 2 3 4 NR</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>13.5 Results of these evaluations are used to revise and improve UC staff performance.</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ND 2 3 4 NR</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>