Strategic Planning Coordinating Council Existing Document Review:
Key Values and Tensions across the Current UM Landscape

Introduction

As one of many activities designed to facilitate understanding of the University of Montana's current landscape, the Strategic Planning Coordinating Council (SPCC) engaged in a comprehensive analysis of existing University of Montana (UM) documents. These documents—ranging from unit-level strategic plans to administrative reports to campus announcements—provide perspectives on how the institution, individual units, and loosely affiliated campus groups represent work, goals, and challenges at UM.

The SPCC read and analyzed fifty-five documents—forty-three internal documents as artifacts of UM's landscape (Appendix A) and twelve external documents representing the current national context for higher education. For each internal document, the SPCC identified strengths, challenges, strategic directions, and level of alignment with the UM 20/20 strategic plan. On average, each document was independently analyzed by two members of the SPCC. The following summarizes the values and tensions that emerged most frequently across these documents, offering one vantage point from which to view the current state of the institution. These values and tensions represent institutional patterns.

The SPCC believes that UM is an organization in a persistent state of learning. These documents capture UM's faculty and staff efforts to regularly inquire into what we do and how we can do better. The SPCC offers this document review in a similar spirit of inquiry and acknowledges that the artifacts reviewed represent only a subset of the UM story.

Emergent UM values, as evidenced by existing UM documents

The SPCC outlines key institutional values that emerged in its review of existing UM documents. While values are critical motivators for the institution, the SPCC recognizes that they become empty concepts when not connected to specific priorities and actions. The SPCC therefore flags those values that UM documents highlight but do not evidence through described practices.

Value #1: Liberal arts

UM is an institution where students learn to think, not a place where students simply meet curricular learning outcomes. A UM education is about more than content mastery: we prepare students to work through complex problems, to synthesize and evaluate information, and to communicate and act upon that information. This liberal education emphasizes not only the liberal arts across a student's general education experience but also international and interdisciplinary opportunities. UM's General Education objectives reflect this commitment to providing a broad intellectual foundation for all students.

Value #2: Internationalization

UM actively promotes internationalization across campus through a host of policies and practices that are responsive to a global environment. While internationalization efforts exist in pockets across campus, UM has not yet fully integrated these efforts to maximize the potential benefits. UM is therefore positioned to leverage and coordinate campus's many existing internationalization efforts.

Value #3: Interdisciplinary and collaborative work

UM faculty and administrators expressly value interdisciplinary and collaborative work. While some programs are highly collaborative, inadequate infrastructure and a lack of systems to support collaboration across disciplines hamper UM's ability to harness a widespread willingness to work across disciplines. Mechanisms for incentivizing and making possible interdisciplinary collaborations could both allow for new faculty partnerships and a more robust interdisciplinary student learning experience.

Value #4: Excellence in research and creative scholarship

UM aspires to excellence in academic programs. Existing documents suggest that the UM community values excellence and growth in research and creative scholarship more consistently and more publicly than excellence in the teaching and mentoring of two-year, undergraduate, and graduate students. Although UM values excellence in academics, the metrics to evaluate our progress in areas outside of research and creative scholarship remain unclear. An institutional commitment to growth in research volume is, however, clear.

Value #5: Growth

UM is an institution that values growth (e.g., in two-year, undergraduate, and graduate student enrollment; in programs and initiatives; in faculty lines; in research dollars). UM's goals are growth-oriented, a fact evidenced by the strategic directions and metrics for success various units identify.

Value #6: Strategic thinking

Some employees across UM value strategic thinking that honors the complexity of a changing landscape in higher education. Those on campus who value strategic thinking take a process-oriented approach to projects and assessment, emphasizing the ongoing nature of continuous improvement and alignment rather than emphasizing a particular endgame. However, campus commitment to strategic thinking appears to be uneven across units and time, and strategic thinking appears to be motivated less by proactive planning and more by reactive anxieties.

Value #7: Reliable data and data-informed action

Campus values sound and consistent data and aims to make decisions that reflect responsible analysis of these data. Various reports and strategic plans suggest an intention to make data-

informed decisions; however, many across campus feel that our in-house data are neither reliable nor accessible. This distrust of and lack of access to reliable data hamstring decision-making processes and strategic thinking.

Value #8: Transparency

Related to a clear value for reliable and accessible data, campus values transparency. Faculty and staff expect clarity regarding the processes that lead to key decisions as well access to the data that inform these decisions and the overarching strategy these decisions serve. They also point to participatory processes as one way to ensure transparency.

Value #9: Diversity

Several units across campus explicitly call out diversity as a strategic objective and central value; however, few outline a well-defined plan for increasing, recognizing, and celebrating diversity.

Key UM tensions, as evidenced by existing UM documents

The SPCC outlines key tensions that emerged in its review of existing UM documents. The SPCC outlines these tensions not as a criticism of the current landscape but rather as an attempt to bring into focus the relationship between our stated vision/values and our lived campus experience. The SPCC highlights these tensions to help our campus community better assess how well our behaviors align with our institutional mission and values (both those values that are institutionally recognized and those that emerged in this document review exercise).

Tension #1: A growth orientation coupled with diminishing resources and unclear purpose

Existing UM documents suggest we aim to grow: in student numbers, in faculty numbers, in research opportunities, in programs offered, and in initiatives created. Meanwhile, these same reports and plans frequently identify inadequate funding as a primary challenge without identifying long-term plans to cope with or address a declining budget. UM positions itself as aiming for growth without adequately planning for a resource limited environment. UM's demonstrated commitment to growth during a time when revenue likely will remain flat at best forces us to ask whether the creation of new programs is unwise or a smart way to keep apace a changing job market.

This failure to align future directions with a challenging resource climate is apparent in a planning and assessment continuum that does not clearly inform resource allocation decisions. While this planning and assessment continuum suggests the institution values clear and fair allocation metrics that reflect institutional priorities, the extent to which these metrics have been defined and shared remains ambiguous. Also, as campus works to identify standardized metrics for resource allocation, some worry that these standardized metrics will fail to account for the unique nature of individual departments.

Finally, the plans and reports reviewed do not suggest a common institution-level purpose that guides this growth. Across the University, efforts to grow appear detached from a central, stated purpose.

Tension #2: An emphasis on quantitative metrics and an absence of qualitative metrics for measuring institutional and unit-level success

At an institutional level and across campus units, quantitative metrics far outweigh qualitative metrics for success. While growth and other quantitative measures are meaningful, little attention is given to the impact this growth has on students, faculty, and staff: *what is the institution's shared purpose for this growth?* A preference for data that indicate growth couple with a dearth of qualitative measures makes it difficult to assess the quality and implications of this growth. For example, enrollment, retention, and completion rates are key externally mandated metrics. However, as by-products of the kind of learning environment created at UM, these metrics are best paired with qualitative metrics that provide insight into the quality of the teaching, learning, and research environment. For example, the institution appears to treat enrollment, retention, and completion as an ends in themselves rather than emphasizing and measuring the kind of efforts that would lead to higher retention, enrollment, and completion. Our metrics for success should reflect the proper ends of education which presumably are defined by more than compliance with externally mandated metrics.

UM's current emphasis on increasing enrollment numbers most immediately reflects the institution's focus on quantitative measures over qualitative measures. The public narrative around UM's success tends to center on the number of students enrolled rather than on the quality of those students' experience. Given that demographic projections suggest a declining or flat enrollment until 2023, measuring our success by growing enrollment risks courting a failure narrative. However, the current MUS funding model encourages an emphasis on capturing FTE, a model that to some extent dictates UM's emphasis on enrollment numbers.

Tension #3: Uneven attention given to the quality of students' academic experience

Arguably, the purpose of UM is student learning at the two-year, undergraduate, and graduate levels and excellence in faculty research. While internal strategic plans and reports emphasize excellence in research, these plans and reports devote notably less attention to the student experience. In those plans that do emphasize a stimulating intellectual undergraduate and graduate student atmosphere, goals appear aspirational while progress toward these goals remains unclear. These reports and plans sometimes state a commitment to strengthening foundational academic programing, which would suggest a shared institutional purpose centered on student learning. However, except in a handful of areas, these plans and reports have little to say about the type of academic student experience UM aims to foster and how the institution might go about strengthening students' learning experiences. In fact, students most frequently surface in these plans and reports as an enrollment figure or goal.

In effect, there appears to be a tension between UM's commitment to excellence in teaching and learning and a lack of attention in these reports and plans to the academic experience of our students. For example, although 42% of our current first-time, full-time Mountain Campus

students and 44.5% of our current first-time, full-time Missoula College students are first-generation, and although 57.8% of our current first-time, full-time Mountain Campus students and 88.7% of our current first-time, full-time Missoula College students are from Montana, the documents reviewed do not evidence coordinated efforts to ensure our knowledge of these demographics informs the way we design the student experience. Also, these plans and reports have comparatively little to say about the role UM's admission standards or UM's international student population plays in curricular planning.

This gap in attention to students' academic experience also exists at the graduate level. For example, lack of general fund support for the Graduate School limits the Graduate School's ability to provide graduate students with meaningful support not only in the form of TA/GA stipends but also in the form of mentorship and supplemental instruction programs.

This silence around the student experience is coupled with a lack of clarity regarding the way faculty and staff are rewarded/recognized for their efforts supporting students, whether as faculty mentors, as advisors, or as student support staff. Excellence in teaching and student support does not appear to be systematically incentivized.

We know that a sense of belonging and a meaningful academic experience attract and retain students. The learning environment our students experience is a variable we can control, yet we wonder to what extent UM has created systems and incentives that resolutely focus on student learning. These existing documents suggest we are not regularly incentivizing and valuing the activities that create a supportive teaching and learning environment.

Tension #4: Pockets of excellence but a lack of coordinated, strategic efforts

UM boasts a diverse academic profile and strongly differentiated units, many of which articulate missions and independent strategic plans. However, this strength in diversity becomes a weakness when differentiation is at odds with a common institutional purpose and when demarcation interferes with smooth integration across units. Internationalization and interdisciplinarity are two notable examples of areas in which existing structures interfere with a coordinated vision.

Many units and academic departments across campus stand as discrete examples of excellence, e.g., in research, in teaching, in internationalization, and in interdisciplinarity. However, some of the plans and reports reviewed highlight a desire for more coordination across campus that would transform disconnected efforts into systems. These documents suggest that UM does not yet effectively engage in systems thinking wherein all employees see a whole and work toward alignment. Uncoordinated internal communication practices and a lack of cross-unit communication channels compromise our ability work productively across the institution. We attend to the ways the organizational chart divides up the campus while struggling to work across units on behalf of UM's larger goals or on behalf of students.

For example, while individual efforts to internationalize campus take place in many units, these endeavors could be (and currently are being) leveraged to create a more purposeful and coordinated plan. Similarly, while academic departments strive for excellence, examples of

interdisciplinary work remain uncommon. Interdisciplinarity appears to emerge despite the system, not as a result of the system.

Tension #5: *Identified goals without clear implementation practices*

Across campus, many units align with the UM 20/20 strategic plan in their stated goals but not necessarily in their described practices. This suggests a disconnect between the current UM vision, mission, and core themes and on-the-ground practices. While UM reports its core theme progress to the accrediting body, how mission and theme alignment are implemented and continually practiced at the unit level remains vague. This begs the question: are we all rowing in the same direction? Do we have a shared compelling aim toward which all units collaboratively align?

At the unit level, existing plans and documents reveal units and programs willing to set ambitious goals whose action plans remain nebulous. Except for in a few notable plans, actionable steps toward both quantitative growth and quality improvement are absent.

Tension #6: *Lack of impactful communication with the public*

UM is an institution where research and teaching influence students, the state, the country, and the globe. However, UM struggles to tell its story of far-reaching and meaningful impact. UM needs to more successfully communicate the value of its research endeavors to the public. UM also struggles to communicate the value of a liberal arts education and to make clear why this value carries relevance today. Regularly and publicly reaffirming our values requires connecting those values to concrete actions and goals, and requires narrating the concrete impact of those values.

Tension #7: *Commitment to data-driven decisions coupled with distrust of UM data*

UM leaders and employees express a commitment to data-informed decisions. However, a deep distrust of our internal data as inconsistent and unreliable afflicts campus. For example, past budget modeling exercises appear to have been constrained by data inconsistencies.

Tension #8: *Growth in online/hybrid education without adequate planning for this growth*

In his 2016 State of the University Address, President Engstrom highlighted the potential for growth in online education, setting ambitious goals for moving a portion of the curriculum online. However, outside of a few exceptions, plans and reports do not attend to the strategic development of online or hybrid education opportunities across the institution. Except in a handful of key areas, online offerings are limited to individual courses with less emphasis on comprehensive online degree programs. The School of Extended and Lifelong Learning (SELL) acts as a critical site for growth in online and hybrid education, but the rest of campus does not appear to regularly partner with SELL to grow distance education offerings. While SELL boasts a thorough action plan for growth, this plan has not been institutionally supported.

Tension #9: Staff and faculty desire for professional development coupled with a system that does not incentivize this development

Faculty and staff undoubtedly value professional development opportunities, both on campus and through regional and national professional organizations. While campus provides a wealth of free professional development opportunities for faculty and staff, a lack of resources limits faculty and staff's ability to regularly access trainings and conferences that would develop their expertise and improve morale. The desire to actively participate in professional development opportunities is at odds with a lack of institutional investment in the resources that would ensure access to these opportunities.

Tension #10: Mismatch between UM 20/20 sustainability and diversity commitments and unit-level practices

Demonstrated commitments to sustainability and diversity—two values identified in the UM 20/20 strategic plan—generally do not surface in these plans and reports. As values that should be embedded across the institution, sustainability and diversity thrive through actively shared responsibility. While key units and groups take responsibility for promoting sustainability and diversity, these efforts are not embedded across units and programs. In general, the work of supporting diversity is treated as a discrete task or supplemental initiative rather than as an integrated part of unit-level culture.

Tension #11: Value for innovation and agility coupled with unique barriers to change

Some units embrace and promote innovative approaches in accomplishing their objectives. These units tend to be more responsive to community/user needs, developing approaches that take into consideration current trends and community feedback. More common—and unsurprising given current budget constraints—most UM units function under a belt tightening culture rather than an innovative one. This is evidenced by cost-savings efforts that far outnumber revenue enhancement or creative service delivery ideas. Innovation exists in pockets, not across the institution.

In general, innovation tends to take place much more quickly outside of higher education. While educational institutions need to be adaptive in their approaches and responsive to a rapidly changing environment, unique barriers to change exist in institutions of higher education, both at an institutional level and at the level of accrediting bodies. Additionally, institutional structures and organizational charts—while intended to promote shared governance and innovation within distinct areas—often slow the institution's response to change.

Appendix A: List of internal UM documents reviewed

2008 Environmental Scan
2014 Institutional Assessment Report
2015 Institutional Assessment Report
2015-2016 President's Report

AAC Unconference Report
AAIP Report
ASUM Resolutions (2016-2017)
Academic Programming Report
Academic Strategic Plan
Administrative Review Report
Alexander Blewett III School of Law Strategic Plan
Alumni Association Strategic Plan
Bitterroot College Strategic Plan
College of Humanities and Sciences Strategic Plan
Cost Savings Report
Davidson Honors College Strategic Plan
Enrollment Management Plan
General Education Preamble
Graduate School Enrollment Management Plan
iLab Report
Information Technology Strategic Plan
Institutional Diversity Strategic Plan
Internal Communications Report
Mansfield Library Strategic Plan
Missoula College Strategic Plan
NCURA 2012 Report
Osat Staff Development Report
Phyllis J. Washington School of Education and Human Services Strategic Plan
Research Strategic Plan
Resource Allocation Report
Revenue Enhancement Report
School for Extended and Lifelong Learning Strategic Plan
School of Business Administration Strategic Plan
School of Journalism Strategic Plan
Skaggs School of Pharmacy Strategic Plan
Student Affairs Strategic Plan
Montana Advocacy Coalition Communications
UM 20/20 Strategic Plan
UM Accreditation Report and Three-year Report
UM Brand Identity Report
UPC Strategic Workgroup Recommendations
University Center Strategic Plan
W.A. Franke College of Forestry and Conservation Strategic Plan