

## **Themes from Interviews, Focus Groups, and Listening Sessions**

Summer 2016-Fall 2016 SPCC team members conducted one-on-one interviews and listening sessions, and a team of Master of Public Administration students conducted focus groups. We provide an overview of emerging themes from each of these endeavors.

It is first important, however, to provide an overview of the methodology for the SPCC qualitative data.

*One on one interviews:* A series of questions were designed by SPCC members Summer 2016 to engage with internal and external stakeholders in the strategic planning process and to understand their perceptions. We used the snowball research approach to interview a variety of external stakeholders about their perceptions about the University of Montana. Each interview took approximately 15-20 minutes and were transcribed by 4 members of the SPCC. A team of SPCC also inductively examined the transcribed interviews to detect themes across interview responses. These themes are presented below. Also, the themes and perceptions identified from these interviews helped inform the SPCC's design of data collection cards and quantitative questions.

*Listening sessions:* A variety of faculty, staff, and community listening sessions were held Fall 2016. Members of the UM community could determine which listening session(s) they wanted to attend. At each listening session, 2-3 SPCC members were present and provided an introduction and a data card to participants. The data card provided a question such as "I chose UM because..." Participants would fill out the data card and give back to an SPCC member. In addition, SPCC members took notes and facilitated a discussion. SPCC members asked participants to not fill out the data card if they had already done so. The data question cards were then transcribed and notes from listening sessions by a team of researchers - SPCC team members, the UM Social Science research laboratory, and an undergraduate research assistant into an excel document. These documents (per data card) were then imported into NVivo (qualitative software) to report reoccurring themes.

*Focus groups:* As part of an independent study project, 5 UM Master of Public Administration students conducted a series of focus groups with internal and external stakeholders. Each focus had 5-8 participants. The focus group data was tape recorded and transcribed by this graduate team of MPA students in consultation with SPCC team members and the social science research laboratory. This team of students used and inductive analysis to detect emerging themes across the groups, challenges, strengths, and weaknesses. This information was presented to the SPCC Fall 2016.

The following provides data themes from across the SPCC qualitative research to offer insights into perspectives of UM's local, state, and regional partners and of internal employees and students.

## One-on-One Interviews

During Summer 2016 thirty-seven individuals participated in one-on-one interviews. These individuals included the MUS Regents, Office of Commission of Higher Education employees, elected officials, federal agency employees, tribal representatives, business leaders, government liaisons, and public school officials. We asked these individuals a series of questions which focused on the following: strengths/weaknesses/challenges of the region; role UM can play in addressing challenges; perceptions about UM; and most important value of a UM education. Instead of listing all of the aggregate-level data for these endeavors, we categorize by group and identify themes present across participant responses.

### *Community Perspective*

Themes that emerged when examining the aggregate level interview data for one-on-one interviews with external community members (e.g. elected officials, public school officials, tribal leaders, business leaders):

1. *Tell the UM Story*: Interviewees are concerned that the University of Montana does not have a clear identity. Interviewees encourage UM to make public the good work we are doing and to take ownership over our strengths. Capitalizing on our own strengths will help efforts at the city, state, or regional level. Simply put, the university should celebrate its accomplishments and serve as a model to address complex issues such as diversity, poverty, sexual assault, to name a few. We need to be vocal about what we do best.
2. *Perceptions*: The overall perceptions about the University of Montana are somewhat positive. However, a common interviewee perception is the university focus is inward, instead of proactively initiating partnerships with the state or region. To make this point, one interviewee stated, “Need to be more of an outward-looking institution. Stifling our creativity because only talking to own. We need to be all over Missoula and the state. Be present everywhere. Be connected. Don’t wait for people to come to us to collaborate.”
3. *Improving Relationships*: State officials/Missoula businesses leaders expressed an eagerness to collaborate with the University of Montana to conduct research that provides future employment opportunities to solve complex issues such as poverty, housing, rural vs. urban divide. Interviewees also expressed a concern that MSU-UM competition hampers our potential and recommended that we work as a Montana University System to solve these complex issues. Additionally, interviewees noted a need for improved relationships with alumni who have more to offer UM than money, e.g., internship programs.
4. *Liberal Arts*: Interviewees touted the value of the liberal arts, linking the liberal arts to important job skills that employers seek – critical thinking, problem solving, professionalism, teamwork, ability to communicate, and reading/writing to name a few.
5. *Technology*: The significance of technological advancement for our state and students emerged as a key theme – offering online courses provides a venue for individuals across the state who might not otherwise be able to obtain an education, for adult learners who

want additional training, and for those who may be interested in the University of Montana as a distance-only option.

6. *Economic Viability*: Without the University of Montana, Missoula and Montana would suffer significant economic losses. The university is needed to help address and provide solutions for economic problems in the state (e.g. affordable housing, jobs to keep students in the state, changes to industry, tourism, and policy).

### *MUS Board of Regents*

Themes that emerged in examining the interview data from the MUS Board of Regents:

1. *The Board is poised to focus its efforts on substantive academic and educational objectives*. There was a sense among Regents that the Board is relatively “new” as a cooperative unit, which poses both challenges and opportunities. Some Regents felt that challenges faced by the MUS (and, in turn, by campus units like UM) would be rectified as the Regents identify collective priorities. One Regent suggested that, at least to date, the Board has focused on budgets and compelling the campuses to “live within their means” rather than emphasizing more substantive academic and educational objectives. Recent discussions underscoring mission differentiation and prioritization across the MUS reflect the Regents’ turn toward more substantive academic and educational targets.
2. *The MUS provides the state with accessible and affordable education*. Regents identified accessibility and affordability as strengths of the MUS and UM. Regents underscored the fact that Montanans support the system, in part, because of these strengths, and pointed to accessibility and affordability as evidence the MUS is responsive to state needs. Regents also acknowledged that drastic changes in tuition levels or in admission standards would impact the system’s level of accessibility and affordability.
3. *Persistent prioritization efforts—in alignment with mission—are necessary to a healthy MUS*. Regents emphasized the need for each campus to clearly define its mission as a first step in system-wide and institution-level prioritization efforts. Regents characterized prioritization as a persistent effort, emphasizing its action-oriented nature and its critical role in strategic thinking and on-going alignment of resources and priorities. Regents therefore stressed prioritization as an opportunity to strategically rationalize programming across the system. Such efforts should influence decision making over the long term.
4. *Excessive competition between the flagship campuses is unhealthy*. Regents acknowledged that the current atmosphere of competition between UM and MSU works against the spirit of a system. In particular, Regents highlighted the importance of mission differentiation reflective of each campus’s niche strengths, emphasizing that UM should not aim to emulate MSU. Regents also expressed concern over the ways competition between the two flagships hampers our ability to take advantage of collaborative opportunities. A lack of effective communication and collaboration between UM and MSU potentially damages the whole system, and the Board owned its responsibility in identifying and removing the barriers to effective collaboration and communication.

5. *Campus leaders need to act in a brave, decisive, and timely fashion.* While Regents emphatically acknowledged the need for strong leadership at the MUS level, they also underscored the need for individual campus leaders to be strategic and brave enough to make decisions that align with campus missions and priorities. Regents stressed the importance of balancing a healthy respect for shared governance with the need to make timely decisions. Anxiety over the urgency of UM's current situation prompted some Regents to encourage UM to recognize that if we don't make the difficult, strategic decisions now, we won't be able to provide strong liberal arts programs and preserve academic freedom in the future. Honoring academic freedom independent of near-term financial consequences is critical; however, we must be strategic enough in the present to preserve the kind of institution we want to have in the future. In sum, Regents stressed that campus leadership needs to act, take risks, and harness the current interest and care of stakeholders.
6. *Success should be measured by more than enrollment figures.* Regents highlighted enrollment challenges but also expressed a desire to move beyond enrollment as the sole measure of success for the MUS and for campus units. Regents resoundingly recognized that a successful UM education rests upon a quality student experience and that the quality of this experience is not captured in enrollment figures. For example, one Regent expressed the importance of student opportunities to form cohort relationships while another expressed a desire to highlight quality in terms of student "impact on the community." At the same time, Regents admitted that the current MUS funding model does not necessarily incentivize qualitative metrics for success. Moving in such a direction would require the Board to rewire the financial incentives and measures that currently drive resource allocation.
7. *UM should embrace its strengths as a liberal arts institution and cultural asset for the region.* As one of two flagship campuses, UM fills a distinct niche in the MUS. Regents spoke about UM's unique intellectual and "psychic" value, stressing that its liberal arts focus should be a point of pride, not only for the professional opportunities it provides graduates but also for the opportunity it gives them to grow into complete, engaged citizens. Regents identified "key learning outcomes" that define the UM student experience: communication skills (including listening), tolerance (mentioned by multiple Regents as a particular strength, speaking to Missoula and UM as a place of diversity and global perspective), "global discovery," community engagement, and hands-on learning through internships and service. While most Regents pointed to the importance of UM's professional schools, and specifically to Missoula College, all underscored the role of UM as the state's flagship liberal arts university.
8. *UM has a responsibility to clearly communicate the relevance of a UM education.* Regents consistently focused on the theme of relevance, specifically in relation to UM's efforts to communicate the relevance and appeal of a liberal arts education. For the Regents, this means embracing our strengths and translating these strengths as highly relevant and tied to career pathways. Some expressed this communication need as a requirement that we better "control the story" about our successes.
9. *Missoula College is a bright spot.* Some Regents highlighted Missoula College as a tremendous opportunity for UM, especially in terms of its new facilities, its strategic location in Western Montana, and its established record of workforce development. At

the same time, some Regents wondered whether UM has sufficiently integrated its other two-year campuses.

10. *Interdisciplinary work should be supported.* Some Regents mentioned the benefits and opportunities of interdisciplinary, applied research and teaching, encouraging UM to build financial and administrative structures to promote interdisciplinary work.
11. *UM should promote an improved “service culture” on campus.* Some Regents flagged “customer service” as an area in need of improvement at UM. They suggested that, while people are working hard, the service culture on campus is in need of improved coordination across systems and increased responsiveness to student and parent expectations.

### *Office of the Commissioner of Higher Education*

Themes that emerged in examining the interview data for OCHE:

1. *The MUS represents a holistic system of distinct campuses.* The MUS provides the state of Montana with accessible and affordable education. While accessibility and affordability are strengths of the MUS, a commitment to affordable access coupled with declining state revenues poses a challenge to the MUS. Interviewees count as a strength of the system the fact that individual campuses retain distinct identities. However, interviewees also stressed that these distinct campuses need to engage in more meaningful mission differentiation across the system. When a single campus aims to offer all programs and be all things to its students, the campus threatens to dilute its quality programs. Effective differentiation also helps to promote a sense of cooperation over competition among the various campuses of the MUS.
2. *The MUS remains a young system in need of coordination.* Incorporated as a system in 1995, the MUS is relatively young. A number of opportunities for system-wide coordination exist while decentralization continues to hamper progress toward more coordinated services. Interviewees recognize the potential for the MUS to develop shared “back office services” such as data management and payroll services, as well as improved MUS communication channels. This centralized coordination would promote efficiency leading to better use of state resources. Interviewees identified a number of efforts currently underway to enhance centralized functionality of the MUS.
3. *UM’s strengths define its distinction in the MUS.* UM remains a flagship institution centered on a high quality liberal arts education. Interviewees highlighted this liberal arts focus as UM’s most important niche, pointing to the institution as “the place where students learn to think.” UM’s strength in the area of externally funded research was also noted, with an emphasis on the connection between campus research and economic growth in the state. Finally, interviewees identified UM as an institution rich with diversity and opportunities for Montana citizens to participate in a “cultural fabric not duplicated anywhere else in the state.” UM provides students with the opportunity to access education at all levels (two-year, undergraduate, graduate) in a vibrant and diverse setting. Finally, interviewees identified the UM campus as one of the most beautiful and vibrant in the state.

4. *UM must prioritize its strengths/programs while identifying the relevance of those strengths/programs.* Interviewees observed that despite its distinctiveness, UM suffers from aiming to be “too many things.” Interviewees stressed that UM needs to identify, own, and make public its strengths, specifically its liberal arts emphasis. Prioritization of UM’s strengths requires metrics tied to quality, retention, and completion, and requires a willingness to reallocate resources to reflect these priorities. UM’s admissions standards signal a promise to our undergraduates: we will support you and prepare you by providing quality academic and support programs. Finally, interviewees acknowledged the challenges inherent in communicating the value of a liberal arts education. UM must find ways to tie its distinct liberal arts focus and its programmatic strengths to the needs of the region and the state, i.e., UM must communicate why the liberal arts are relevant today in terms of “return on investment,” personally and professionally, and in both the short and long-term.
5. *UM experiences a tension between its emphasis on enrollment and its emphasis on quality.* Interviewees underscored the need to emphasize quality over enrollment. The prognosis for enrollment in Montana is flat, at best. A successful UM education will not be measured by number of students but rather by the quality of those students’ experience. An enrollment obsession will not move UM forward; growth is a by-product of quality.
6. *The MUS funding model may contribute an unsustainable FTE race.* While interviewees stressed that success should not be measured by FTE, they also acknowledged that the current funding model—outside of performance-based funding—encourages an FTE race. This FTE race, however, is unsustainable as demographic projections suggest a declining or flat enrollment until 2023. Meanwhile, state budget and tax revenues are expected to decline.
7. *UM needs to become a more agile and decisive institution.* Interviewees observed that the UM needs to become a more nimble institution. Campus leaders must find ways to be agile and decisive while continuing to honor shared governance.
8. *The University needs to improve its “culture of service.”* Interviewees highlighted UM’s obligation to create streamlined and intuitive pathways for students as they navigate across campus services, departments, and programs. Students should not be baffled, discouraged, or hampered by our student service systems. UM can also improve the way it connects with alumni and prospective students (and parents) around the state.
9. *Two-year education and distance learning offer potential for growth.* Multiple interviewees expressed excitement about the new Missoula College building and the opportunity it represents for UM to expand its service to students seeking two-year education, and to meet Montana’s workforce development needs. More than one interviewee suggested that the University build additional distance learning capacity in order to serve the non-traditional student population in Montana.

### Focus Groups

As part of an independent study project, three UM Master of Public Administration students conducted focus groups with: the Office of the Commissioner of Higher Education (OCHE), Staff, Associated Students of the University of Montana (ASUM), and a freshman cohort. These

groups were asked a range of questions which ranged from: how do you define a liberal arts education; what courses/services allow students to graduate on time; what skills/qualities do you want students to have upon graduation; UM strengths/weaknesses; what could UM do better/stay the same.

In analyzing the data, the students discovered similar themes across the four focus groups, which included:

1. *Advising* is an issue on campus that needs to be addressed.
2. *Teamwork* across departments and programs to support students is important and customer service is improving, but continues to be an issue.
3. *Programs and services* that allow students to have practical experience to prepare them for the work force regardless of major are important.
4. A *disconnect* exists with understanding the mission and plan of UM by staff and students.
5. *No consistent definition for the "liberal arts,"* but similarities across the groups in identifying critical thinking skills, as well as betterment for society are crucial skills gained from a liberal arts education.

### Listening Sessions

Many listening sessions were held by SPCC members with UM faculty, staff, and the Missoula community to better understand their current obstacles and ideas for future innovation. The following offers general themes from: Missoula College, Bitterroot College, UM graduate students, UM faculty/staff and the Missoula community.

#### *Missoula College*

General themes which emerged from two Missoula College listening session:

1. *Communication*: MC Faculty expressed the need for better communication between their campus and main campus. "Gulf between our campuses is Grand Canyon sized". There is a need to streamline transition between AA students onto Bachelors, very difficult for students to transfer between campuses. The process of transferring between MC and main campus should be seamless. The student population is very different at MC, more non-traditional and battered/bruised students; students who need more one on one attention. Would not like to be pigeon holed as a vo-tech, very proud of the programs, but MC does more.
2. *Health Professions*: Discussion on UMHM and lack of collaboration with MC and their health profession programs which has four (4) robust programs that have competitive admissions. MC has annually 600+ students in their A&P courses. MC faculty discussed that MC was left out and not included in any discussion of UMHM. Lengthy discussion on Missoula College Nursing Program and their Associate of Science Nursing (ASN) program; the need to broaden it to BSN program and the competitiveness of their program. In terms of Healthcare, it makes more sense to have nursing based here than the other locations.

3. *Financial*: MC generates funding dollars which in turn go back to main campus (general fund) and it is hard to get those funds back in forms of much needed Teaching Assistants. MC Faculty discussed that main campus had resentment towards funds going to MC versus using the funds on the main campus; MC has no sabbatical for their faculty, contracts didn't allow it. Would like to see innovation funds at a college level for the faculty to use to expand their teaching, etc. Certain academic programs at MC have budgets that are very expensive but severely underfunded e.g. Diesel program.

### *Bitterroot College*

General themes which emerged from a Bitterroot College listening session:

1. *Student and Faculty Commitment*: BC faculty share a deep commitment to not only the BC campus but through the BC to the local community. Both students and faculty are rooted in the Bitterroot community, a place that distinguishes BC students and faculty. This commitment to place is evidenced not only by faculty members' decision to teach at the BC but also by their willingness to continue teaching for the BC when there is no current hope for a tenure-track appointment. BC faculty describe BC students as "incredibly committed and willing to make sacrifices" that differ in type and degree from the sacrifices made by students on the Mountain Campus. This shared student/faculty commitment to being educated *in place* marks one of the BC's distinguishing features.
2. *Strong Faculty-Student Relationships*: BC faculty stress that a unique component of a BC education is the high level of student-faculty engagement. A shared sense of commitment to the BC creates a "cohort" among BC faculty and students, both at the classroom level and at the institutional level. The faculty bring to their work an expressed aim to be approachable, available, and clearly "in it" with the students. The faculty feel that BC students appreciate and persist in part due to this immediate engagement with the faculty.
3. *Potential for and Obstacles to Growth*: BC faculty stress that the BC campus and curriculum are poised for growth and fully capable of meeting current workforce needs. Faculty felt that UM is missing a critical opportunity to meet demand and needs in the Bitterroot, not only in workforce development but also in providing core course opportunities for those students who intend to transfer. Faculty highlighted the talent in the room and asked why they are not given the chance to grow in a market they feel clearly is asking for increased programming. Faculty acknowledged that initial University investments would be needed to allow for this growth, but they stressed that these would be investments that certainly would pay off.
4. *Recruitment and Advising*: BC faculty feel that UM is missing the opportunity to recruit both new and continuing students for the BC. Faculty reiterated that UM has an obligation to provide education to Bitterroot residents, many who come from families in which higher education has not been viewed as a viable option. Faculty feel that while the BC is not allowed to recruit independently, UM enrollment and advising offices need to more explicitly advertise the opportunities the BC provides. Faculty had a number of suggestions: allow the BC to develop its own connections with high school counselors, educate Mountain and Missoula College advisors on available BC courses that might

serve continuing Mountain Campus or Missoula College students, create regular information sharing sessions among the larger UM advising community (perhaps ensuring that the BC advisor attends the UAC Advising Conversations on a regular basis), and create an advising position that is shared between the BC and the Missoula College or Mountain campus.

5. *Internal Relationships and Communication Challenges:* BC faculty feels that they, the BC leadership team, and BC students are not heard. They named this listening session as one of the very few opportunities the faculty have had to provide input into a larger University-wide process. The faculty agreed that these are relationship problems that emerge from a lack of shared understanding of the critical, value-added role the BC plays in the Bitterroot and for the University.

### *UM Graduate Students*

The UM Graduate and Professional Student Organization convened a listening session for 12 students and the apparent themes stressed included:

1. *Liberal Arts are Career Skills:* Students expressed concerns about the lack of definition for the liberal arts and not making strong enough connections between the liberal arts and career skills. Instead of saying liberal arts, why not create language that promotes what it is, a well-rounded education. Liberal arts exposes students to different points of view and challenges us about how to think about the world – think about how we can embrace this and market it in a better fashion.
2. *Honor our History:* UM should be honored for a quality education. This has been overshadowed by the rape scandal, but get back to our roots and celebrate and focus on our successes. We should work with alumni to document these successes moving forward.
3. *The Need for Effective Communication:* How do we market a liberal arts education? Link this to enrollment and tell parents during recruitment. Do a better job of reaching the eastern part of the state by using students to provide testimonials of why a liberal arts education matters and important for future employment.
4. *Celebrate and Focus on the Positive:* All too often UM is jaded by negative press, change the conversation and focus on the positive – link this to the community, outdoor opportunities and the beauty of the campus.

### *Faculty and Staff Listening Sessions*

In addition to the Missoula College and Bitterroot College faculty and staff listening sessions, the SPCC hosted a series of listening sessions on the Mountain campus to focus on two of the key SPCC guiding aspects: identity and human capital. The following themes emerged across ten sessions.

The themes from UM human capital listening sessions:

1. *Strategic Resource & Workload Management:* Employees are overwhelmed due to budget constraints and cutbacks and said they are now required to “do more with less”.

Underlying the concerns about general budgetary shortages was a deeper concern about the perceived lack of strategy associated with our current cutbacks—both through cuts that are seen as opportunistic rather than strategic, and the inability to innovate and improve our current position (i.e. when employees identify ways to increase efficiency and save time and money, we lack the time and money to actually implement those changes). Most employees realize that they are paid less at UM relative to the same position at other Universities in the region (and elsewhere), but even more, that many staff employees do not make a living wage.

2. *Craving a Culture of Teamwork*: A “caste system” exists among employee types, units, and different campuses. The various types of employees (faculty, staff, contract professionals) seem to be segregated and separated. Staff members feel a lack of respect for their role, while Contract Professional employees feel they do not have a clear home or representation (i.e. no Staff Senate, no Faculty Senate). Employees identified a lack of understanding of other employee’s experiences, expertise, and challenges, due to separation into “silos”. Missoula College employees feel they are treated like second class citizens and Bitterroot College employees feel misunderstood and disconnected. There is a strong desire for more collaboration, interdisciplinary work, and understanding of other employees and units, not only for improving respect, but efficiency.
3. *Ineffective Processes & Structures*: Employees feel our systems, policies, and processes are hindering advancement, improvement, and innovation. Many employees are frustrated with our reliance on paper processes, which were described as just the “tip of the iceberg” of our bureaucratic systems. Additionally, the various processes (especially those students interact with), must be streamlined and connected to provide a more user-friendly experience.
4. *Communication/Leadership*: Employees feel disconnected from leadership. They do not feel included in decision-making, they crave clear direction, and want improvements in trust and transparency. In many ways, these concerns can be boiled down to the problem of ineffective communication systems on campus. They would also like to see more support and training opportunities for managers to execute these priorities, and more empowerment for employees to enact them.
5. *Positive Working Environment*: Although employees identified the above areas as needing improvement, there was a final theme of gratitude for the unique experience of working at UM, which employees described as a special environment that provided many enriching and valuable opportunities—for learning, for engagement, and for community. Working in an energetic and inspiring campus environment is described as a big positive by UM employees. This is a place where learning and discovery surrounds us daily, and employees appreciate that atmosphere and associated opportunities. They find it rewarding to work with students and other dedicated UM employees. Many employees said they were proud to work at UM and hoped that we could “change the conversation” to focus more on the positive aspects of UM instead of feeling drenched in negativity.

*The themes from UM faculty listening sessions*

1. *Leadership and Room for Innovation:* Faculty stressed their ability to be able to serve on committees which match their interests and to conduct the research they want to do. However, one concern is the lack of leadership from the top to provide means for faculty to innovate on campus. Others noted this might be a MUS system problem, but opportunities for new ideas are stopped by individuals in leadership positions due to lack of funding.
2. *Clarification about Program Prioritization:* Many faculty used some of the listening sessions to question the SPCC process and its role in the future of program prioritization.
3. *Support for Research:* During faculty sessions there was a concern for the lack of research support on campus. A few noted that they believed they were paying for tenure due to cuts in travel budgets to conduct research in the arts. Moreover, others stressed that if we are a research intensive university, more support needs to be generated.
4. *Liberal Arts and Research can Coalesce:* Across the faculty listening sessions, there was a strong sense of pride and dedication for a liberal arts education, one of the strongest elements of a UM education. However, others stressed that the term “liberal” detracts from the meaning of a liberal arts education and UM needs to address this. Some suggested linking this to civic engagement and what UM does – the liberal arts is necessary for students upon graduation.
5. *Enrollment and Allocation:* Another concern expressed across faculty sessions is the increased emphasis on increasing enrollment or the number of students, which could be negatively impacting the quality of a program. Number of students is also affecting the allocation of resources for programs/departments.