

The University of Montana



2010 SELF-STUDY

APPENDIX

The University of Montana

2010 Self-Study

Appendix Listing

1.	Standard One	Student FTE Enrollment Analysis, FY 2004-FY 2010	Exhibit SM 1-01
2.	Standard Three	Retention and Graduation Rates, Fall 1991 to Fall 2007	Exhibit RD 3-04
3.	Standard Three	Undergraduate Attrition, Fall 2007 to Fall 2008	Exhibit OSM 3-01
4.	Standard Three	Admissions Report	Required Table #1
5.	Standard Three	Student Affairs Staff Profile	Required Table #2
6.	Standard Four	Faculty Counts Table	Exhibit RD 4-01
7.	Standard Four	Institutional Faculty Profile	Required Table #1
8.	Standard Five	Mansfield Library General Funds Budget Pattern	Exhibit RE 5-09
9.	Standard Six	The University of Montana-Missoula Organizational Chart	Exhibit RD 6-02
10.	Standard Six	Academic Affairs Organizational Chart	Exhibit RD 6-02
11.	Standard Seven	Current Funds Revenues	Required Table #1
12.	Standard Seven	Current Funds Expenditures and Mandatory Transfers	Required Table #2
13.	Standard Seven	Summary Report of Revenues and Expenditures	Required Table #3
14.	Standard Seven	Sources of Financial Aid	Required Table #4
15.	Standard Seven	Operating Gifts and Endowments-UM Foundation	Required Table #9
16.	Standard Seven	Operating Gifts and Endowments-Grizzly Scholarship Association	Required Table #9
17.	Standard Seven	Capital Investments	Required Table #10
18.	Standard Eight	Administration and Finance Organizational Chart	Exhibit OSM 8-06

The University of Montana
Student FTE Enrollment Analysis, FY 2004-FY 2010

	<u>Actual</u> FY 2004	<u>Actual</u> FY2005	<u>Actual</u> FY 2006	<u>Actual</u> FY 2007	<u>Actual</u> FY 2008	<u>Actual</u> FY 2009	<u>Budgeted</u> FY 2010
Missoula							
College of Technology							
Resident	855.27	873.44	966.97	1,032.97	1,162.50	1,278.66	1,344.10
Resident Distance	-	-	-	-	23.44	34.13	20.90
WUE	6.23	2.03	4.50	7.53	13.30	9.85	8.00
Nonresident	34.07	41.23	47.94	57.31	75.20	95.08	105.00
Nonresident Distance	-	-	-	-	1.53	5.31	1.00
Total	895.57	916.70	1,019.41	1,097.81	1,275.97	1,423.03	1,479.00
Lower Division							
Resident	4,695.57	4,496.54	4,451.83	4,444.57	4,418.00	4,551.00	4,299.40
Resident Distance	-	-	-	-	4.50	24.20	10.60
WUE	327.50	359.34	413.66	395.63	444.27	377.52	450.00
Nonresident	1,239.20	1,224.67	1,249.14	1,264.14	1,225.37	1,300.76	1,432.60
Nonresident Distance	-	-	-	-	0.69	8.00	2.40
Total	6,262.27	6,080.54	6,114.63	6,104.34	6,092.83	6,261.48	6,195.00
Upper Division							
Resident	2,368.73	2,470.40	2,357.23	2,401.89	2,458.64	2,530.50	2,329.69
Resident Distance	-	-	-	-	1.86	6.80	5.30
WUE	145.53	147.75	172.54	241.44	253.07	253.18	280.00
Nonresident	653.30	654.77	639.57	603.40	593.47	583.76	599.67
Nonresident Distance	-	-	-	-	1.33	2.14	4.34
Total	3,167.56	3,272.92	3,169.34	3,246.73	3,308.37	3,376.38	3,219.00
Subtotal Undergraduate (excluding COT)							
Resident	7,064.30	6,966.94	6,809.06	6,846.46	6,876.64	7,081.50	6,629.09
Resident Distance	-	-	-	-	6.36	31.00	15.90
WUE	473.03	507.08	586.20	637.07	697.34	630.70	730.00
Nonresident	1,892.50	1,879.44	1,888.71	1,867.54	1,818.84	1,884.52	2,032.27
Nonresident Distance	-	-	-	-	2.02	10.14	6.74
Total	9,429.83	9,353.46	9,283.97	9,351.07	9,401.20	9,637.86	9,414.00

The University of Montana
Student FTE Enrollment Analysis, FY 2004-FY 2010

	<u>Actual</u> FY 2004	<u>Actual</u> FY2005	<u>Actual</u> FY 2006	<u>Actual</u> FY 2007	<u>Actual</u> FY 2008	<u>Actual</u> FY 2009	<u>Budgeted</u> FY 2010
Graduate I							
Resident	837.50	805.92	819.92	809.33	835.76	839.87	884.50
Resident Distance					10.00	29.67	9.50
Nonresident	334.67	338.63	337.96	343.13	350.67	322.31	368.00
Nonresident Distance	-	-	-	-	3.50	3.71	4.00
Total	1,172.17	1,144.55	1,157.88	1,152.46	1,199.93	1,195.56	1,266.00
Graduate II							
Resident	289.50	309.21	303.97	330.94	361.42	344.72	362.75
Resident Distance					0.87	1.25	0.25
Nonresident	226.87	224.67	217.38	207.74	195.58	181.00	193.00
Nonresident Distance	-	-	-	-	-	0.13	-
Total	516.37	533.88	521.35	538.68	557.87	527.10	556.00
Subtotal Graduate							
Resident	1,127.00	1,115.13	1,123.89	1,140.27	1,197.18	1,184.59	1,247.25
Resident Distance	-	-	-	-	10.87	30.92	9.75
Nonresident	561.54	563.29	555.34	550.87	546.25	503.31	561.00
Nonresident Distance	-	-	-	-	3.50	3.84	4.00
Total	1,688.54	1,678.42	1,679.23	1,691.14	1,757.80	1,722.66	1,822.00
Total							
Resident	9,046.57	8,955.50	8,899.92	9,019.70	9,236.32	9,544.75	9,220.44
Resident Distance	-	-	-	-	40.67	96.05	46.55
WUE	479.26	509.11	590.70	644.60	710.64	640.55	738.00
Nonresident	2,488.11	2,483.96	2,491.99	2,475.72	2,440.29	2,482.91	2,698.27
Nonresident Distance	-	-	-	-	7.05	19.29	11.74
Total	<u>12,013.94</u>	<u>11,948.57</u>	<u>11,982.61</u>	<u>12,140.02</u>	<u>12,434.97</u>	<u>12,783.55</u>	<u>12,715.00</u>

The University of Montana
Retention and Graduation Rates, Fall 1991 to Fall 2007

Institution-wide Rates for All First-time, Full-time, Bachelor-degree-seeking Freshmen

Fall	Headcount	Average ACT	Average SAT	Retention Rate		Cumulative Graduation/Continuation Rates							
				After 1 Year	After 2 Years	Within 4 Years		Within 5 Years		Within 6 Years		Within 10 Years	
						Grad	Cont	Grad	Cont	Grad	Cont	Grad	Cont
1991	1,303	22.1	1049	70.5%	55.3%	10.1%	35.5%	30.2%	14.7%	36.8%	8.2%	42.3%	1.8%
1992	1,393	22.6	1053	67.7%	52.7%	10.0%	34.1%	29.1%	12.7%	36.3%	6.2%	42.6%	1.5%
1993	1,423	22.5	1058	66.2%	52.1%	13.3%	32.1%	32.0%	11.7%	38.1%	6.3%	44.6%	1.2%
1994	1,512	22.5	1057	63.0%	53.6%	16.6%	29.9%	34.1%	9.7%	39.9%	4.6%	45.0%	0.9%
1995	1,452	22.8	1078	64.8%	51.9%	17.9%	27.7%	33.8%	11.0%	40.3%	5.6%	45.2%	0.7%
1996	1,618	22.3	1069	70.5%	55.8%	20.0%	28.7%	37.3%	11.8%	43.3%	5.7%	48.2%	1.4%
1997	1,711	22.7	1083	71.1%	57.0%	19.6%	33.0%	38.3%	11.7%	45.0%	5.4%	50.7%	1.0%
1998	1,604	22.7	1077	70.2%	57.2%	19.3%	32.4%	37.5%	13.0%	44.0%	6.5%	49.3%	1.1%
1999	1,671	22.6	1087	68.3%	54.8%	20.3%	30.8%	36.8%	10.8%	44.0%	4.8%		
2000	1,750	22.3	1062	69.7%	57.8%	19.7%	28.9%	36.2%	11.8%	42.3%	5.9%		
2001	1,764	22.4	1068	69.4%	57.4%	19.5%	31.3%	36.5%	12.2%	43.2%	6.3%		
2002	1,788	22.1	1072	71.3%	58.0%	18.5%	31.3%	35.7%	12.6%	41.9%	6.0%		
2003	1,770	22.5	1079	69.5%	57.7%	19.4%	33.4%	36.9%	13.6%				
2004	1,808	22.4	1075	69.8%	56.8%	19.4%	30.6%						
2005	1,770	22.9	1093	72.1%	60.4%								
2006	1,658	22.9	1080	71.7%	61.8%								
2007	1,662	22.9	1069	71.5%									
2008	1,856	23.0	1076										

Avg.	1,640	22.6	1,071	69.2%	56.3%	17.4%	31.4%	35.0%	12.1%	41.3%	6.0%	46.0%	1.2%
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NOTES: As reported to the Consortium for Student Retention Data Exchange (CSRDE), Center for Institutional Data Exchange and Analysis, University of Oklahoma.

Cohorts consist of first-time full-time bachelor-degree-seeking students (freshmen) with no college experience. Includes students enrolled in the fall term who attended for the first time in the prior summer term.

The University of Montana
Undergraduate Attrition, Fall 2007 to Fall 2008

Totals	Traditional Degree-Seeking				Non-Traditional	Nondegree-Seeking	Post-Baccalaureate	Total
	Residents	Nonresidents	WUE	Subtotal				
Total Undergrads Enrolled Fall 07	6,591	1,829	695	9,115	574	185	393	10,267
Plus: New Freshman - Fall 08	1,236	519	113	1,868	139	0	0	2,007
Plus: New Transfers - Fall 08	461	208	20	689	4	107	80	880
Plus: Re-enrolling Students - Fall 08	803	135	13	951	105	10	129	1,195
Residency\Level Changes	46	(60)	(20)	(34)	4	(17)	71	0
Less: Graduations-Fall 07 thru Summer 08	(1,050)	(271)	(126)	(1,447)	(63)	0	(40)	(1,550)
Plus: Persisting Degreed Undergraduates	4	0	0	4	0	0	59	63
Less: Total Enrolled Fall 08	(6,771)	(1,939)	(619)	(9,329)	(592)	(139)	(495)	(10,555)
Attrition Fall 08	1,320	421	76	1,817	171	122	197	2,307
Percent Attrition	20.0%	23.0%	10.9%	19.9%	29.8%	65.9%	50.1%	22.5%
Lower Division	Traditional Degree-Seeking				Non-Traditional	Nondegree-Seeking	Post-Baccalaureate	Total
	Residents	Nonresidents	WUE	Subtotal				
Lower Undergrads Enrolled Fall 07	3,168	1,015	359	4,542	359	185		5,086
Plus: New Freshman - Fall 08	1,236	519	113	1,868	139	0		2,007
Plus: New Transfers - Fall 08	290	119	8	417	1	107		525
Plus: Re-enrolling Students - Fall 08	369	69	2	440	81	10		531
Residency/Level Changes	43	(14)	(6)	23	6	(29)		0
Less: Graduations-Fall 07 thru Summer 08	0	0	0	0	0	0		0
Plus: Persisting Degreed Undergraduates				0				0
Less: Progression From Lower to Upper	(986)	(296)	(142)	(1,424)	(70)	(12)	0	(1,506)
Less: Lower Enrolled Fall 08	(3,278)	(1,131)	(280)	(4,689)	(382)	(139)		(5,210)
Attrition Fall 08	842	281	54	1,177	134	122	0	1,433
Percent Attrition	26.6%	27.7%	15.0%	25.9%	37.3%	65.9%		28.2%

The University of Montana
Undergraduate Attrition, Fall 2007 to Fall 2008

Upper Division

	Traditional Degree-Seeking				Non-Traditional	Nondegree-Seeking	Post-Baccalaureate	Total
	Residents	Nonresidents	WUE	Subtotal				
Upper Undergrads Enrolled Fall 07	3,423	814	336	4,573	215		393	5,181
Plus: Progression From Lower to Upper	1,011	285	138	1,434	70		2	1,506
Plus: New Freshman - Fall 08				0				0
Plus: New Transfers - Fall 08	171	89	12	272	3		80	355
Plus: Re-enrolling Students - Fall 08	434	66	11	511	24		129	664
Residency/Level Changes	(22)	(35)	(10)	(67)	(2)		69	0
Less: Graduations-Fall 07 thru Summer 08	(1,050)	(271)	(126)	(1,447)	(63)		(40)	(1,550)
Plus: Persisting Degreed Undergraduates	4			4			59	63
Less: Upper Enrolled Fall 08	(3,493)	(808)	(339)	(4,640)	(210)		(495)	(5,345)
Attrition Fall 08	478	140	22	640	37	0	197	874
Percent Attrition	14.0%	17.2%	6.5%	14.0%	17.2%		50.1%	16.9%

Calculated Totals	Traditional Degree-Seeking				Non-Traditional	Nondegree-Seeking	Post-Baccalaureate	Total
	Residents	Nonresidents	WUE	Subtotal				
Total Undergrads Enrolled Fall 07	6,591	1,829	695	9,115	574	185	393	10,267
Plus: New Freshman - Fall 08	1,236	519	113	1,868	139	0	0	2,007
Plus: New Transfers - Fall 08	461	208	20	689	4	107	80	880
Plus: Re-enrolling Students - Fall 08	803	135	13	951	105	10	129	1,195
Residency/Level Changes	21	(49)	(16)	(44)	4	(29)	69	0
Progression Lower to Upper Differences	25	(11)	(4)	10	0	(12)	2	0
Less: Graduations-Fall 07 thru Summer 08	(1,050)	(271)	(126)	(1,447)	(63)	0	(40)	(1,550)
Plus: Persisting Degreed Undergraduates	4	0	0	4	0	0	59	63
Less: Total Enrolled Fall 08	(6,771)	(1,939)	(619)	(9,329)	(592)	(139)	(495)	(10,555)
Attrition Fall 08	1,320	421	76	1,817	171	122	197	2,307
Percent Attrition	20.0%	23.0%	10.9%	19.9%	29.8%	65.9%	50.1%	22.5%
Attrition Fall 08 - Query	1,320	421	76	1,817	171	122	197	2,307
Balance	0	0	0	0	0	0	0	0

The University of Montana
Standard 3: Students - Table 1 - Admissions Report

	Fall 2006	Fall 2007	Fall 2008	Fall 2009
First-time Freshmen Applications Received				
Applied	4,841	4,756	5,324	5,471
Admitted	4,644	4,532	5,101	5,193
Denied*	197	224	223	278
Enrolled	2,139	2,199	2,479	2,369
Transfer Applications Received				
Applied	1,973	1,772	1,814	1,966
Admitted	1,729	1,568	1,607	1,713
Denied*	244	204	207	253
Enrolled	911	833	915	979
Readmission Applications Received				
Applied	254	289	290	358
Admitted	242	274	267	327
Denied*	12	15	23	31
Enrolled	146	175	170	204
Graduate Applications Received				
Applied	1,666	1,761	1,658	1,810
Admitted	745	746	709	876
Denied*	921	1,015	949	934
Enrolled	428	416	394	500
Professional Applications Received				
Applied	597	653	630	601
Admitted	222	255	245	242
Denied*	375	398	385	359
Enrolled	115	116	119	116
Nondegree Applications Received				
Applied	446	341	320	319
Admitted	435	336	310	309
Denied*	11	5	10	10
Enrolled	259	206	190	195

* Denials are not recorded in the MUS Student Datawarehouse. This figure is derived, calculated as the difference between the number of applied and admitted students.

** Professional practice doctoral applicants, formerly first-professional.

The University of Montana
Standard 3: Students - Table 2 - Student Affairs Staff Profile

		Professional	Support	Student	Other
Gender:	Female	72	142	455	12
	Male	37	88	316	9
Degrees:	PhD, EdD	7	0	1	1
	MD, JD, MSW	17	1	0	0
	MA, MS	23	9	10	2
	BA, BS	52	66	14	3
	AA, AAS, Certificate, etc.	10	53	15	6
Years Experience in Field:	none	1	1	20	0
	less than 5	12	50	667	11
	5 - 10	24	68	20	8
	11 - 15	12	43	0	3
	16 - 20	13	22	0	0
	more than 20	47	46	0	0
Full-time:	9/10 months	11	26	0	0
	12 months	69	181	0	0
Part-time:	9/10 months	15	12	587	0
	12 months	14	11	184	22

**The University of Montana
Faculty Counts, Academic Year 2008-09**

	<u>Headcount</u>						<u>Percentage of Total</u>					
	Instructional Faculty (Instructional FTE > 0.00)			All Faculty (Instructional and Other)			Instructional Faculty			All Faculty		
	<u>FT</u>	<u>PT</u>	<u>Total</u>	<u>FT</u>	<u>PT</u>	<u>Total</u>	<u>FT</u>	<u>PT</u>	<u>Total</u>	<u>FT</u>	<u>PT</u>	<u>Total</u>
<u>Total faculty</u>	519	165	684	548	200	748	100%	100%	100%	100%	100%	100%
Nonresident alien (international)	25	12	37	28	14	42	5%	7%	5%	5%	7%	6%
Minorities	67	17	84	70	21	91	13%	10%	12%	13%	11%	12%
Women	189	79	268	197	95	292	36%	48%	39%	36%	48%	39%
Men	330	86	416	351	105	456	64%	52%	61%	64%	53%	61%
<u>Tenure status</u>	519	165	684	548	200	748	100%	100%	100%	100%	100%	100%
Tenured (CT)	309	11	320	311	12	323	60%	7%	47%	57%	6%	43%
Tenure track (PT)	151	6	157	152	7	159	29%	4%	23%	28%	4%	21%
Nontenurable (NT)	59	148	207	85	181	266	11%	90%	30%	16%	91%	36%
<u>Rank</u>	519	165	684	548	200	748						
Professor	221	16	237	226	25	251	39%	7%	30%	38%	9%	29%
Associate Professor	128	10	138	134	16	150	23%	4%	17%	23%	6%	17%
Assistant Professor	135	49	184	151	61	212	24%	21%	23%	25%	23%	25%
Instructor	19	82	101	20	90	110	3%	35%	13%	3%	33%	13%
Lecturer	16	8	24	17	8	25	3%	3%	3%	3%	3%	3%
<u>Total full-time equivalent (FTE)</u>	519	61	580	548	74	622	89%	11%	100%	88%	12%	100%
<u>Have doctorate, FP, or other terminal degree</u>	455	73	528	481	95	576	88%	44%	77%	88%	48%	77%
Highest degree is Doctorate (PhD, EdD)	384	43	427	407	63	470	74%	26%	62%	74%	32%	63%
Highest degree is Juris Doctor (FP degree)	23	12	35	24	12	36	4%	7%	5%	4%	6%	5%
Highest degree is PharmD (FP degree)	9	1	10	9	1	10	2%	1%	1%	2%	1%	1%
Terminal master's or other terminal degree	39	17	56	41	19	60	8%	10%	8%	7%	10%	8%
<u>Have other than a terminal degree (nonterminal)</u>	62	82	144	64	94	158	12%	50%	21%	12%	47%	21%
Highest degree is master's (nonterminal)	55	55	110	57	66	123	11%	33%	16%	10%	33%	16%
Highest degree is bachelor's	5	26	31	5	27	32	1%	16%	5%	1%	14%	4%
Degree status is ABD (all but dissertation)	2	1	3	2	1	3	0%	1%	0%	0%	1%	0%
<u>Other</u>	2	10	12	3	11	14	0%	6%	2%	1%	6%	2%
<i>January 15, 2009 REVISED</i> NWCCU – UM total, Instr and All; USNWR – Mountain Campus, Instr; Princeton Review – UM Total, Instr; CDS – UM Total												

Standard 4: Faculty – Table 1 – Institutional Faculty Profile
 Profile of Instructional Faculty at The University of Montana for Academic Year 2008-09¹

Rank and Tenure Status	All Instructional Faculty ² (Number)			Full-time Instructional Faculty															
				Number of Highest Awarded Degrees						Academic Year Salary (\$) ³			Years of Experience at UM			Average Fall 2008 Credit Hour Load			
	Full Time	Part Time	Total	Dr ⁴	M	Bacc	Prof License	Less than Bacc	No Data	Minimum	Average	Maximum	Min	Avg	Max	Min	Avg	Max	
Professor																			
	Tenure line	205	8	213	174	31	0	0	0	0	51,948	78,076	142,673	2	20	42	2	12	69
	Nontenurable	5	10	15	3	2	0	0	0	0	52,000	76,865	115,000	0	6	15	6	8	10
Associate Professor																			
	Tenure line	124	12	136	108	15	1	0	0	0	47,537	62,871	107,729	0	9	32	2	11	42
	Nontenurable	3	3	6	2	1	0	0	0	0	42,848	49,803	63,478	3	9	14	5	8	10
Assistant Professor																			
	Tenure line	118	9	127	99	19	0	0	0	0	43,000	57,015	94,930	0	3	15	0	10	42
	Nontenurable	21	58	79	12	7	1	0	0	1	26,400	44,262	90,577	0	5	18	6	13	25
Instructor/Educator (COT)																			
	Tenure line	33	1	34	5	18	6	0	2	2	33,261	48,833	64,375	1	13	32	3	15	27
	Nontenurable	30	165	195	2	19	4	0	2	3	26,187	36,544	62,063	0	5	23	1	13	44
Lecturer																			
	Nontenurable	16	9	25	8	6	2	0	0	0	32,720	44,937	70,439	1	8	22	5	11	34
Postdoctoral Scholar																			
	Nontenurable	1	0	1	1	0	0	0	0	0	30,000	30,000	30,000	1	1	1	0	0	0

¹ Source: The University of Montana Office of Planning, Budget and Analysis, employee database, unpublished data, derived.

² Instructional faculty includes those with instructional FTE of 0.01 or higher.

³ Salaries for faculty on fiscal year (twelve-month) contracts have been adjusted to the academic year (nine-month) equivalent.

⁴ Doctorates, including professional practice doctorates (J.D., PharmD, DPT)

Standard 4: Faculty – Table 1 – Institutional Faculty Profile (continued)
Profile of Research Faculty at The University of Montana for Academic Year 2008-09⁵

Rank and Tenure Status	All Research Faculty ⁶ (Number)			Full-time Research Faculty															
				Number of Highest Awarded Degrees							Academic Year Salary (\$) ⁷			Years of Experience at UM			Average Fall 2008 Credit Hour Load		
	Full Time	Part Time	Total	Dr ⁸	M	Bacc	Prof License	Less than Bacc	No Data	Minimum	Average	Maximum	Min	Avg	Max	Min	Avg	Max	
Professor																			
Tenure line	14	2	16	13	1	0	0	0	0	52,612	75,451	93,090	1	14	27	2	6	22	
Nontenurable	4	7	11	4	0	0	0	0	0	62,826	71,641	97,329	13	23	34	4	4	4	
Associate Professor																			
Tenure line	6	0	6	2	4	0	0	0	0	38,784	55,304	82,436	4	14	37	1	2	4	
Nontenurable	7	7	14	6	1	0	0	0	0	44,489	53,199	60,002	1	10	16	2	6	14	
Assistant Professor																			
Tenure line	9	0	9	1	8	0	0	0	0	31,493	37,714	65,000	1	5	17	1	2	3	
Nontenurable	18	12	30	14	3	0	0	0	1	39,233	50,008	67,743	0	7	29	0	3	8	
Instructor/Educator (COT)																			
Tenure line	1	0	1	1	0	0	0	0	0	58,343	58,343	58,343	26	26	26	0	0	0	
Nontenurable	2	10	12	0	1	0	0	0	1	26,187	33,094	40,000	0	3	6	5	5	5	
Lecturer																			
Nontenurable	1	0	1	0	1	0	0	0	0	45,691	45,691	45,691	22	22	22	0	0	0	
Postdoctoral Scholar																			
Nontenurable	35	4	39	26	1	2	0	2	4	29,246	40,190	58,301	0	2	6	2	4	8	

⁵ Source: The University of Montana Office of Planning, Budget and Analysis, employee database, unpublished data, derived.

⁶ Research faculty includes those with no instructional FTE.

⁷ Salaries for faculty on fiscal year (twelve-month) contracts have been adjusted to the academic year (nine-month) equivalent.

⁸ Doctorates, including professional practice doctorates (J.D., PharmD, DPT)

**Maureen and Mike Mansfield Library
General Funds Budget Pattern**

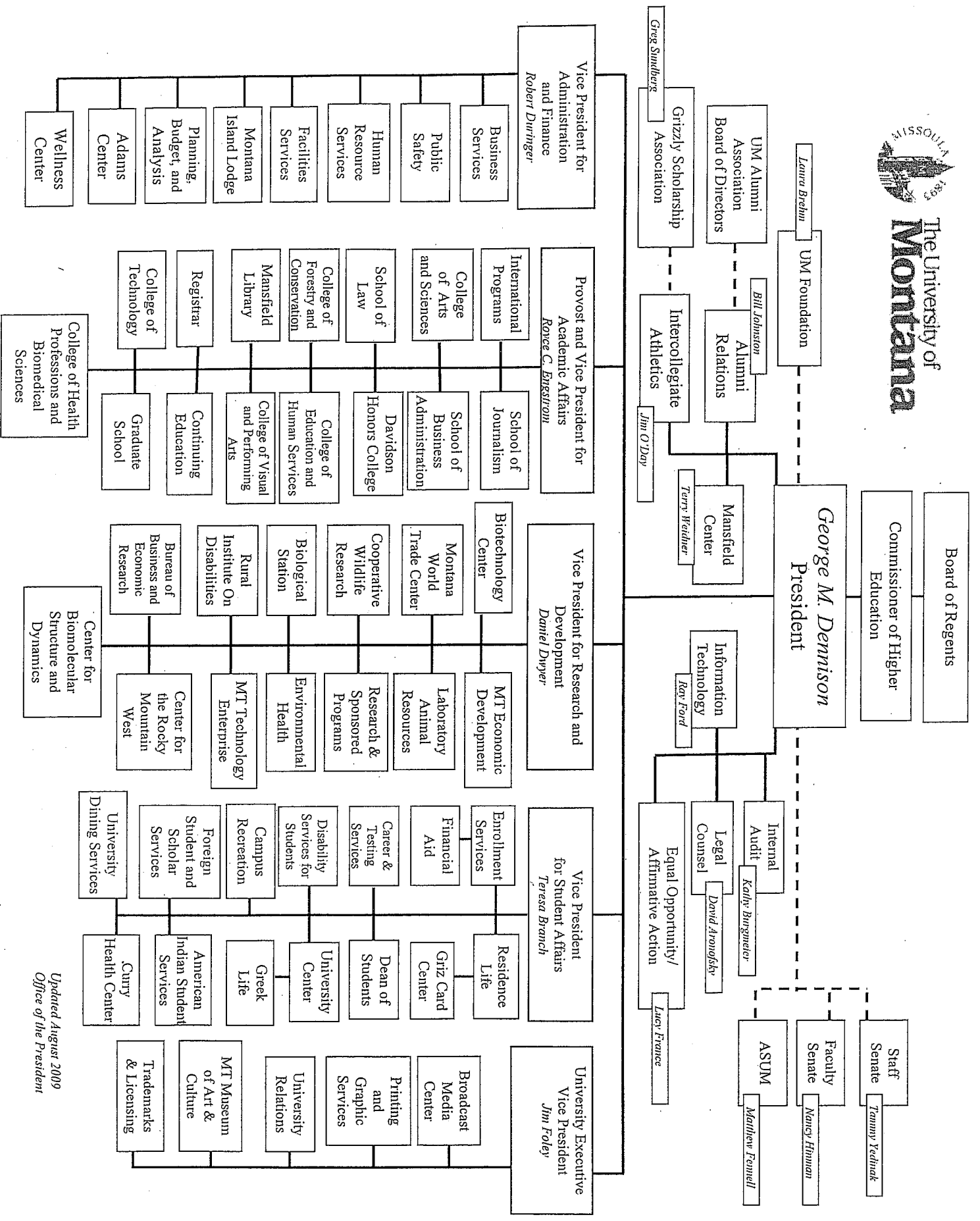
	FY2009/10	FY2008/09	FY2007/2008	FY2006/2007	FY2005/2006	FY2004/2005
General Operations						
Faculty	\$839,227.00	\$ 809,099.00	\$ 760,745.00	\$ 753,289.00	\$ 699,468.00	\$ 736,572.00
Admin & Professional Staff	\$301,406.00	\$ 291,376.00	\$ 281,958.00	\$ 280,901.00	\$ 254,557.00	\$ 249,255.00
Students/Hourly	\$1,150,200.00	\$ 1,156,450.00	\$ 1,082,779.00	\$ 1,064,584.00	\$ 1,008,230.00	\$ 987,050.00
TOTAL Personnel	\$2,423,930.00	\$ 2,361,245.00	\$ 2,224,573.00	\$ 2,169,298.00	\$ 2,041,691.00	\$2,002,072.00
Operations	\$ 214,896.00	\$ 214,896.00	\$ 224,896.00	\$ 224,896.00	\$ 207,634.00	\$216,211.00
Total Gen Operations	\$ 2,638,826.00	\$ 2,576,141.00	\$ 2,449,469.00	\$ 2,394,154.00	\$ 2,266,587.00	\$2,218,223.00
OTO Funds (Faculty Computers 07 - 10 & Voyager Maintenance for 06)	\$ 6,000.00	\$ 6,000.00	\$ 12,720.00	\$ 5,325.00	\$ 114,894.00	
Collections Budgets						
Dept. Initiated orders	\$ 320,000.00	\$ 360,000.00	\$ 310,000.00	\$ 340,000.00	\$ 340,000.00	\$ 312,000.00
Library Initiated orders	\$ 300,163.00	\$ 300,925.00	\$ 217,396.00	\$ 320,670.00	\$ 287,270.00	\$ 297,606.00
YBP Core Book Approval Plan	\$ 140,116.00					
Supplemental Fund for Mono & Media	\$ 40,000.00					
Ebooks and Econtent	\$ 150,000.00	\$ 140,000.00	\$ 145,000.00	\$ 150,000.00	\$ 147,000.00	\$609,606.00
Digitization Projects	\$ 950,279.00	\$ 800,925.00	\$ 672,396.00	\$ 810,670.00	\$ 774,270.00	\$740,000.00
Total Monographs	\$ 2,430,809.00	\$ 2,236,000.00	\$ 1,778,000.00	\$ 1,050,000.00	\$ 799,000.00	\$1,140,000.00
Electronic Resources	\$ 344,000.00	\$ 395,000.00	\$ 740,000.00	\$ 1,080,000.00	\$ 1,190,000.00	\$15,000.00
Serials	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 15,000.00	\$ 20,000.00	\$319,000.00
Binding	\$ 250,000.00	\$ 250,000.00	\$ 250,000.00	\$ 250,000.00	\$ 319,000.00	\$319,000.00
Document Delivery						
Spec Proj OTO Recon						
Total Collections	\$ 3,985,088.00	\$ 3,691,925.00	\$ 3,450,396.00	\$ 3,224,670.00	\$ 3,102,270.00	\$ 2,823,606.00
Total Gen Fund Budget	\$ 6,623,914.00	\$ 6,268,066.00	\$ 5,899,865.00	\$ 5,618,824.00	\$ 5,368,857.00	\$5,041,829.00
Special Initiatives - Elect. Resources						\$0.00
Provost						\$162,000.00
Research & Development						\$54,375.00
CAS, CFC, SPAH						\$216,375.00

**Maureen and Mike Mansfield Library
General Funds Budget Pattern**

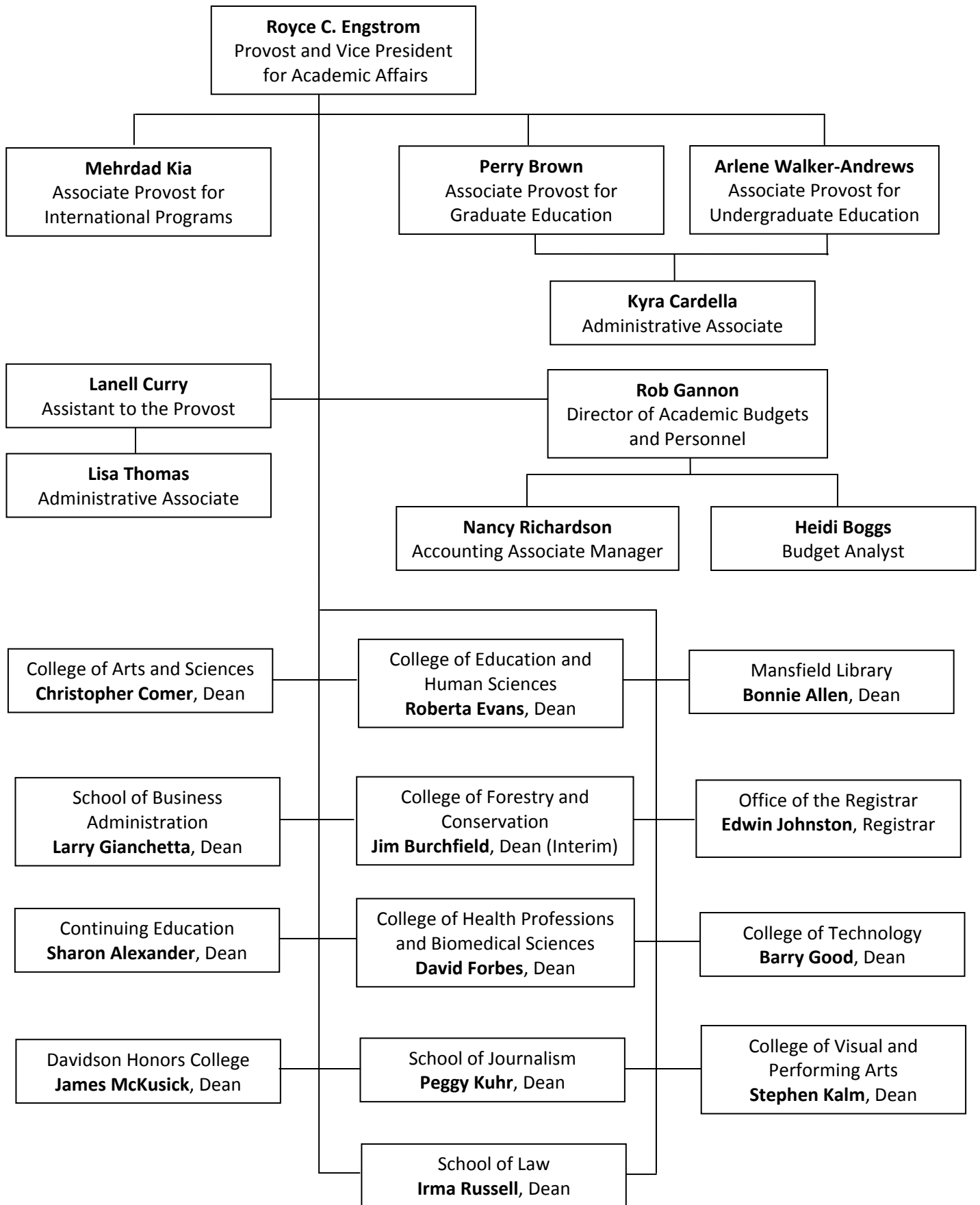
	FY2003/2004	FY2002/2003	FY2001/2002	FY2000/2001	FY1999/2000
General Operations					
Faculty	\$ 768,235.00				
Admin & Professional	\$ 248,527.00				
Staff	\$ 973,099.00				
Students/Hourly	\$ 7,090.00				
TOTAL Personnel	\$1,996,951.00	\$2,027,166.00	\$2,006,954.00	\$1,965,247.00	\$1,881,347.00
Operations	\$219,438.00	\$306,465.00	\$360,603.00	\$197,334.00	\$137,391.00
Total Gen Operations	\$2,244,995.00	\$2,333,631.00	\$2,367,557.00	\$2,162,581.00	\$2,018,738.00
OTO Funds (Faculty Computers 07 - 10 & Voyager Maintenance for 06)					
Collections Budgets					
Dept. Initiated orders	\$ 312,000.00				
Library Initiated orders	\$ 337,779.00				
YBP Core Book Approval Plan					
Supplemental Fund for Mono & Media					
Ebooks and Econtent					
Digitization Projects					
Standing Orders					
Total Monographs	\$649,779.00				
Electronic Resources	\$689,012.00				
Serials	\$959,692.00				
Binding	\$30,891.00				
Document Delivery	\$309,367.00				
Spec Proj OTO Recon	\$35,000.00				
Total Collections	\$2,638,741.00	\$2,385,000.00	\$2,208,148.00	\$2,108,140.00	\$2,107,971.00
Total Gen Fund Budget	\$4,883,736.00	\$4,718,631.00	\$4,575,705.00	\$4,270,721.00	\$4,126,709.00
Special Initiatives - Elect. Resources					
Provost	\$50,050.00	\$50,000.00			
Research & Development	\$68,000.00	\$68,250.00			
CAS, CFC, SPAH	\$54,375.00	\$54,750.00			
	\$172,425.00	\$173,000.00			



The University of Montana



Office of the Provost and Vice President for Academic Affairs
 ORGANIZATIONAL CHART



The University of Montana
Standard 7: Finance - Table 1 - Current Funds Revenues (Public Institutions Only)

Source (IPEDS Report)		ACTUAL					
		Year 1 (FY07)		Year 2 (FY08)		Year 3 (FY09) ²	
		Amount	% ¹	Amount	%	Amount	%
Tuition and Fees		82,339,623	30.69%	85,359,066	30.70%	87,754,607	29.03%
Government Appropriations							
Federal							
State		41,533,783	15.48%	48,206,994	17.34%	53,126,100	17.58%
Local							
Government Grants & Contracts							
Federal:	Unrestricted						
	Restricted	52,105,763	19.42%	52,073,767	18.73%	60,239,436	19.93%
State:	Unrestricted						
	Restricted	7,355,134	2.74%	7,936,919	2.86%	8,399,757	2.78%
Local:	Unrestricted						
	Restricted	5,839,636	2.18%	7,647,011	2.75%	7,235,442	2.39%
Private Gifts,	Unrestricted						
Grants, Contracts	Restricted	15,096,392	5.63%	19,548,136	7.03%	30,833,131	10.20%
Investment	Unrestricted	6,994,620	2.61%	1,997,761	0.72%	(1,307,393)	-0.43%
Income	Restricted						
Sales and Services of Educational Activities		12,978,904	4.84%	12,586,368	4.53%	14,463,547	4.78%
Auxiliary Enterprises ⁴		26,914,259	10.03%	28,577,654	10.28%	28,439,713	9.41%
Other Sources		17,156,561	6.39%	14,064,145	5.06%	13,093,606	4.33%
Independent Operations							
Total Current Funds		268,314,675	100.00%	277,997,821	100.00%	302,277,946	100.00%

¹ Percentage of Total Current Fund Revenues

² Most recent fiscal year for which audited financial statements are available

⁴ Fee Income for Auxiliaries is included in line titled "Tuition and Fees"

The University of Montana
Standard 7: Finance - Table 1 - Current Funds Revenues (Public Institutions Only)

Source (IPEDS Report)	PROJECTED					
	Year 4 (FY10) ³		Year 5 (FY11)		Year 6 (FY12)	
	Amount	%	Amount	%	Amount	%
Tuition and Fees	90,700,000	29.77%	93,400,000	30.65%	96,200,000	30.88%
Government Appropriations						
Federal						
State	54,400,000	17.85%	49,800,000	16.34%	49,000,000	15.73%
Local						
Government Grants & Contracts						
Federal:						
	60,400,000	19.82%	62,000,000	20.35%	65,000,000	20.87%
State:						
	8,500,000	2.79%	8,500,000	2.79%	8,500,000	2.73%
Local:						
	8,500,000	2.79%	8,500,000	2.79%	8,500,000	2.73%
Private Gifts,						
Grants, Contracts	25,500,000	8.37%	20,000,000	6.56%	20,000,000	6.42%
Investment	(2,000,000)	-0.66%	2,000,000	0.66%	2,000,000	0.64%
Income						
Sales and Services of Educational Activities	13,400,000	4.40%	13,800,000	4.53%	14,200,000	4.56%
Auxiliary Enterprises ⁴	29,300,000	9.62%	30,200,000	9.91%	31,100,000	9.98%
Other Sources	16,000,000	5.25%	16,500,000	5.42%	17,000,000	5.46%
Independent Operations						
Total Current Funds	304,700,000	100.00%	304,700,000	100.00%	311,500,000	100.00%

³ Budget for Current Year

The University of Montana

Standard 7: Finance - Table 2 - Current Funds Expenditures and Mandatory Transfers (Public Institutions Only)

Functions (IPEDS Report)	ACTUAL					
	Year 1 (FY07)		Year 2 (FY08)		Year 3 (FY09) ²	
	Amount	% ¹	Amount	%	Amount	%
Education and General Expenditures						
Instruction	70,728,029	30.47%	73,437,874	29.23%	76,656,418	29.05%
Research	38,731,927	16.69%	39,664,627	15.79%	41,162,269	15.60%
Public Service	11,202,000	4.83%	11,934,204	4.75%	12,361,194	4.68%
Academic Support	18,953,013	8.17%	22,921,981	9.13%	25,042,439	9.49%
Student Services	16,684,067	7.19%	17,674,864	7.04%	18,452,367	6.99%
Institutional Support	19,393,566	8.36%	20,673,382	8.23%	21,466,231	8.13%
Plant Operations & Maintenance	15,771,777	6.80%	19,942,213	7.94%	19,949,143	7.56%
Scholarships and Fellowships	12,270,683	5.29%	13,702,987	5.46%	15,550,438	5.89%
Educational and General Mandatory Transfer						
Total Educational and General Expenditures/ Mandatory Transfers	203,735,062	87.78%	219,952,132	87.56%	230,640,499	87.39%
Auxiliary Enterprises (Including Transfers)	28,365,152	12.22%	31,246,655	12.44%	33,276,186	12.61%
Hospitals (Including Transfers)						
Independent Operations (Including Transfers)						
Total Current Funds Expenditures & Mandatory Transfers	232,100,214	100.00%	251,198,787	100.00%	263,916,685	100.00%

¹ Percentage of Total Current Fund Revenues

² Most recent fiscal year for which audited financial statements are available

The University of Montana

Standard 7: Finance - Table 2 - Current Funds Expenditures and Mandatory Transfers (Public Institutions Only)

Functions (IPEDS Report)	PROJECTED					
	Year 4 (FY10) ³		Year 5 (FY11)		Year 6 (FY12)	
	Amount	%	Amount	%	Amount	%
Education and General Expenditures						
Instruction	81,500,000	29.23%	81,500,000	28.65%	81,500,000	28.07%
Research	42,000,000	15.06%	43,300,000	15.22%	44,600,000	15.36%
Public Service	12,500,000	4.48%	12,500,000	4.39%	12,500,000	4.31%
Academic Support	27,600,000	9.90%	28,200,000	9.91%	28,800,000	9.92%
Student Services	19,300,000	6.92%	20,300,000	7.14%	21,300,000	7.34%
Institutional Support	21,900,000	7.86%	22,600,000	7.94%	23,300,000	8.03%
Plant Operations & Maintenance	20,200,000	7.25%	20,400,000	7.17%	20,600,000	7.10%
Scholarships and Fellowships	16,800,000	6.03%	17,600,000	6.19%	18,500,000	6.37%
Educational and General Mandatory Transfer						
Total Educational and General Expenditures/ Mandatory Transfers	241,800,000	86.73%	246,400,000	86.61%	251,100,000	86.50%
Auxiliary Enterprises (Including Transfers)	37,000,000	13.27%	38,100,000	13.39%	39,200,000	13.50%
Hospitals (Including Transfers)						
Independent Operations (Including Transfers)						
Total Current Funds Expenditures & Mandatory Transfers	278,800,000	100.00%	284,500,000	100.00%	290,300,000	100.00%

³ Budget for Current Year

The University of Montana

Standard 7: Finance - Table 3 - Summary Report of Revenues and Expenditures (Public¹ and Private Institutions)

	ACTUAL			PROJECTED		
	Year 1 (FY07)	Year 2 (FY08)	Year 3 (FY09) ²	Year 4 (FY10) ³	Year 5 (FY11)	Year 6 (FY12)
	Amount	Amount	Amount	Amount	Amount	Amount
Education and General						
Revenues	241,400,416	249,420,167	273,838,233	275,400,000	274,500,000	280,400,000
Expenditures	203,735,062	219,952,132	230,640,499	241,800,000	246,400,000	251,100,000
Transfers - Mandatory						
- Non Mandatory						
Net Excess (Deficit)	37,665,354	29,468,035	43,197,734	33,600,000	28,100,000	29,300,000
Auxiliary Enterprises						
Revenues	26,914,259	28,577,654	28,439,713	29,300,000	30,200,000	31,100,000
Expenditures	28,365,152	31,246,655	33,276,186	37,000,000	38,100,000	39,200,000
Transfers - Mandatory						
- Non Mandatory						
Net Excess (Deficit)	(1,450,893)	(2,669,001)	(4,836,473)	(7,700,000)	(7,900,000)	(8,100,000)
Net Operational Excess (Deficit)	36,214,461	26,799,034	38,361,261	25,900,000	20,200,000	21,200,000

¹ Optional for public institutions

² Most recent fiscal year for which audited financial statements are available

³ Budget for Current Year

The University of Montana
Standard 7: Finance - Table 4 - Sources of Financial Aid

		ACTUAL						PROJECTED					
		FY 2007		FY 2008		FY 2009		FY 2010		FY 2011		FY 2012	
		Amount		Amount		Amount		Amount		Amount		Amount	
		(\$ 000)	%	(\$ 000)	%	(\$ 000)	%	(\$ 000)	%	(\$ 000)	%	(\$ 000)	%
Financial aid to students, all sources													
		82,476	100%	89,273	100%	106,619	100%	113,150	100%	119,040	100%	125,250	100%
	<u>Gift aid</u> (grants, scholarships, tuition or fee waivers)	30,357	37%	32,257	36%	38,969	37%	42,000	37%	42,800	36%	42,600	34%
	Federal gift aid	11,542	14%	12,022	13%	13,815	13%	18,900	17%	19,700	17%	19,500	16%
	Pell Grants	10,356	13%	10,750	12%	12,436	12%	17,500	15%	18,200	15%	18,900	15%
	Other federal grants	1,186	1%	1,272	1%	1,379	1%	1,400	1%	1,500	1%	600	0%
	State or local government gift aid	8,561	10%	8,668	10%	9,935	9%	9,900	9%	9,900	8%	9,900	8%
	Institutional aid and other (scholarships, fellowships, grants)	10,254	12%	11,566	13%	15,219	14%	13,200	12%	13,200	11%	13,200	11%
	<u>Loans to students*</u>	50,803	62%	55,601	62%	65,968	62%	69,600	62%	74,690	63%	81,100	65%
	Federal loans	49,493	60%	52,550	59%	62,684	59%	66,300	59%	71,290	60%	77,600	62%
	Institutional loans	0	0%	91	0%	118	0%	100	0%	100	0%	100	0%
	Private loans to students*	1,309	2%	2,960	3%	3,166	3%	3,200	3%	3,300	3%	3,400	3%
	<u>Work-study aid</u>	1,317	2%	1,414	2%	1,682	2%	1,550	1%	1,550	1%	1,550	1%
	Federal work-study	973	1%	1,011	1%	931	1%	1,200	1%	1,200	1%	1,200	1%
	State work-study	344	0%	404	0%	751	1%	350	0%	350	0%	350	0%
	<u>Federal PLUS loans to parents</u>	7,763	----	7,805	----	6,757	----	7,200	----	7,700	----	8,300	----
	Total	90,239		97,077		113,376		120,350		126,740		133,550	

Note: Projections assume elimination of some federal grants (ACG, SMART), flat scholarships and waivers, and elimination of current Perkins loans.

*Loans to students for which the funds pass through the Financial Aid Office. Does not include loans to parents.

The University of Montana

Standard 7: Finance - Table 9 - Operating Gifts and Endowments-UM Foundation (Public and Private Institutions)

	ACTUAL			PROJECTED	
	Year 1 (FY07)	Year 2 (FY08)	Year 3 (FY09) ¹	Year 4 (FY10) ²	Year 5 (FY11)
UM Foundation	Amount	Amount	Amount	Amount	Amount
Annual Gifts					
Operations Restricted	5,275,620	3,513,964	3,868,383	4,200,000	4,200,000
Operations Unrestricted	11,740,308	12,162,608	14,513,151	12,800,000	12,800,000
Endowments Exclusive of Foundation Gifts					
Plant	4,755,090	1,034,300	16,028,429	5,000,000	5,000,000
Total	21,771,018	16,710,872	34,409,963	22,000,000	22,000,000
Ratio of Annual Gifts to E & G					
Endowment Fund Balance					
Permanent	77,808,302	83,355,425	86,388,575	86,000,000	86,000,000
Term	68,746,232	70,593,269	39,110,013	39,000,000	39,000,000
Quasi	6,720,732	6,561,957	(4,860,357)	-	-
Total	153,275,266	160,510,651	120,638,231	125,000,000	125,000,000

¹ Most recent fiscal year for which audited financial statements are available

² Budget for Current Year

Note: If applicable, explain/describe Foundation relationship and prepare separate statement for Foundation gifts to the institution.

The University of Montana

Standard 7: Finance - Table 9 - Operating Gifts and Endowments-Grizzly Scholarship Association (Public and Private Institutions)

	ACTUAL			PROJECTED	
	Year 1 (FY07)	Year 2 (FY08)	Year 3 (FY09) ¹	Year 4 (FY10) ²	Year 5 (FY11)
Grizzly Scholarship Association	Amount	Amount	Amount	Amount	Amount
Annual Gifts					
Operations Restricted	1,193,880	1,257,065	1,469,315	1,475,000	1,500,000
Operations Unrestricted	360,457	469,254	472,305	500,000	500,000
Endowments Exclusive of Foundation Gifts					
Plant					
Total	1,554,337	1,726,319	1,941,620	1,975,000	2,000,000
Ratio of Annual Gifts to E & G					
Endowment Fund Balance					
Permanent	-	-	-	-	
Term	913,841	1,073,083	1,200,195	1,200,000	1,200,000
Quasi	950,771	1,063,895	821,610	830,000	950,000
Total	1,864,612	2,136,978	2,021,805	2,030,000	2,150,000

¹ Most recent fiscal year for which audited financial statements are available

² Budget for Current Year

The University of Montana
Standard 7: Finance - Table 10 - Capital Investments (All Institutions)

DO NOT INCLUDE DEPRECIATION EXPENSE	ACTUAL			PROJECTED	
	Year 1 (FY07)	Year 2 (FY08)	Year 3 (FY09) ²	Year 4 (FY10) ³	Year 5 (FY11)
	Amount (\$)	Amount (\$)	Amount (\$)	Amount (\$)	Amount (\$)
Land ³					
Beginning Cost	14,432,996	14,432,996	14,666,800	21,556,345	23,556,345
Additions	-	233,804	6,889,545	2,000,000	1,000,000
Deductions	-	-	-	-	-
Ending Cost	14,432,996	14,666,800	21,556,345	23,556,345	24,556,345
Buildings					
Beginning Cost	150,871,044	150,871,044	184,635,073	190,556,999	231,205,650
Additions	-	33,816,029	5,921,926	40,648,651	1,457,530
Deductions	-	52,000	-	-	-
Ending Cost	150,871,044	184,635,073	190,556,999	231,205,650	232,663,180
Building Improvements					
Beginning Cost	98,309,543	100,778,022	102,239,736	109,552,225	111,333,610
Additions	2,468,479	1,512,946	8,298,640	1,781,385	8,059,745
Deductions	-	51,232	986,151	-	-
Ending Cost	100,778,022	102,239,736	109,552,225	111,333,610	119,393,355
Furniture and Equipment					
Beginning Cost	33,274,885	36,757,635	39,747,716	45,003,945	51,829,890
Additions	3,853,581	4,897,679	6,225,962	6,825,945	5,000,000
Deductions	370,831	1,907,598	969,733	-	-
Ending Cost	36,757,635	39,747,716	45,003,945	51,829,890	56,829,890
Library Books					
Beginning Cost	44,770,692	46,305,737	47,476,744	48,727,857	50,086,857
Additions	1,535,045	1,291,042	1,251,113	1,359,000	1,400,000
Deductions	-	120,035	-	-	-
Ending Cost	46,305,737	47,476,744	48,727,857	50,086,857	51,486,857
Museum and Art					
Beginning Cost	14,983,288	15,702,616	16,030,999	16,210,959	16,210,959
Additions	749,829	328,383	295,750	-	300,000
Deductions	30,500	-	41	-	-
Ending Cost	15,702,616	16,030,999	16,326,709	16,210,959	16,510,959
Construction in Progress					
Beginning Cost	28,339,138	43,213,643	37,287,404	50,425,629	20,398,266
Additions	17,341,952	29,276,484	34,248,336	12,402,673	4,103,313
Deductions	2,467,447	35,202,723	21,110,111	42,430,036	9,517,275
Ending Cost	43,213,643	37,287,404	50,425,629	20,398,266	14,984,304
Debt Service					
Principal	4,700,452	5,194,890	5,223,159	5,200,000	5,300,000
Interest	6,298,352	6,413,729	6,075,222	6,100,000	5,800,000
Depreciation (Private Institutions Only)					

¹ Most recent fiscal year for which audited financial statements are available
² Budget for Current Year
³ The category land includes the cost of land, land improvements, and infrastructure.

The University of Montana
Standard 7: Finance - Table 10 - Capital Investments (All Institutions)

SOURCES OF FUNDS (Construction in Progress)			
Project	Budget Authorization	Total Expenditures through June 2009	Funding Source
Skaggs Addition Basement	806,930	458,237	Grants
ISB 2nd Floor	790,555	649,995	Series J
Law School Expansion	14,900,000	13,098,970	Donations, LRB, Grant, Series J
Research Facility	13,724,510	13,327,070	2005 Series J Revenue Bonds
Native American Studies Center	8,503,330	4,145,688	Donations
Northern Tier Network Pipeline	1,000,000	123,675	Intercap Loan
PE complex Electrical	400,000	134,027	Intercap Loan, Institutional
Steamline Auxiliary Upgrade	458,600	52,549	2005 Series J Revenue Bonds
Phyllis J Washington Education Center	11,533,709	9,426,928	Donations, State, Series I Deferred Maint, Aux, Plant
	52,117,634	41,417,139	

**The University of Montana, Missoula
Vice President for Administration and Finance
FY 2010 Organizational Chart**

