



# MUS Strategic Plan

<https://mus.edu/data/strategic-plan/>

The Montana University System Strategic Plan is the primary planning document of the Board of Regents. The Plan sets forth an agenda for higher education in Montana by delineating the strategic directions, goals, and objectives that guide the Montana University System (MUS).

## [Introduction](#) | [Success Agenda](#) | [Guiding Principles](#)

### Goal 1: Access & Affordability

Increase the overall educational attainment of Montanans through increased participation, retention and completion rates in the Montana University System.

- [College Participation](#)
- [Retention & Completion](#)
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- [K-20 Collaboration](#)
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### Goal 2: Workforce & Economic Development

Assist in the expansion and improvement of the state's economy through the development of high value jobs and the diversification of the economic base.

- [Workforce Development](#)
- [Research & Development](#)
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### Goal 3: Efficiency & Effectiveness

Improve institutional and system efficiency and effectiveness.

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## Introduction

<https://www.mus.edu/data/strategic-plan/introduction.html>

The Montana University System Strategic Plan is the primary planning document of the Board of Regents. The Plan sets forth an agenda for higher education in Montana by delineating the strategic directions, goals, and objectives that guide the Montana University System (MUS).

## History

In July 2006, after several years of study, public dialogue, and internal deliberations, the Board of Regents approved the Strategic Plan. Since then, updates have occurred annually, including revisions to strategic initiatives as well as a refreshing of the data within each goal.

The development of the Strategic Plan began with two primary initiatives. The first was to work more closely with the interim legislature to develop a set of mutually agreed upon accountability measures that would guide the MUS and evaluate progress. Working with the Postsecondary Education Policy and Budget (PEPB) subcommittee of the 57th Legislature, the Board of Regents did develop this set of accountability measures in July 2002. Subsequently, the PEPB subcommittee has updated the accountability measures. This latest set of agreed-upon measures evolved into “shared policy goals” and work to form one base for this strategic plan.

The second initiative was to work with the PEPB Subcommittee to explore new ways for the MUS take a more direct leadership role in the state’s economic development. This overall effort, called “Shared Leadership for a Stronger Montana Economy”, engaged a broad range of Montanans to prioritize specific initiatives that would help establish a new role for the MUS in strengthening the state’s economy. The Governor’s Office and several legislative interim committees were included in the effort. In July 2004, the Board of Regents and the PEPB subcommittee met jointly and agreed on three priority initiatives for immediate implementation:

- Develop stronger business-university system partnerships for workforce training;
- Remove barriers to access for postsecondary education; and
- Expand distance learning programs and training.

## Goals

The Strategic Plan is comprised of three primary goals that contain a series of sub-goal statements and objectives within each area.

### ***Goal 1: Access & Affordability***

Increase the overall educational attainment of Montanans through increased participation, retention and completion rates in the Montana University System

### ***Goal 2: Workforce & Economic Development***

Assist in the expansion and improvement of the state’s economy through the development of high value jobs and the diversification of the economic base

***Goal 3: Efficiency & Effectiveness***

Improve institutional and system efficiency and effectiveness

Maintaining the high quality of our institutions and the education provided to our students is not listed as an explicit goal. This is because it is THE MOST IMPORTANT consideration for every goal and initiative of the Montana University System and is considered to be an integral part of every component of this strategic plan.

In an effort to increase the overall educational attainment of Montanans and provide an efficient and effective system of higher education, the Board of Regents adopted a *Success Agenda* to augment the Strategic Plan and help guide the Montana University System.

- 1. Resident Student Access:** Develop a unified approach to resident student recruitment, admissions, and financial aid, with the goal of increasing the percentage of MT high school graduates attending the MUS.
  - Expand awareness and further remove barriers through the continuous improvement of the College & Career Readiness portal and expanded use of the Central Application.
  - Improve the utilization of data resources to increase opportunities for communication, recruitment, and admittance of resident students.
  - Utilize the portal as an avenue to increase financial aid awareness (e.g. FAFSA completion, state funded financial, etc.).
  
- 2. Dual Enrollment:** Increase awareness, capacity, and opportunities for dual enrollment in Montana.
  - Continue the 1-2-Free program (first 6 credits for free).
  - Work to centralize dual enrollment application and registration processes.
  - Focus on maximizing dual enrollment course quality, alignment of dual enrollment courses with industry and university credentials/pathways, and conversion of dual enrollment students to full-time enrollment at MUS institutions.
  
- 3. Retention:** Improve retention and completion rates of students by promoting and employing systemwide strategies.
  - Expand and evaluate the Montana 10 student success intervention to improve retention, completion and time-to-degree among low income resident students.
  - Increase clarity and impact of incentives for campuses to meet and exceed retention targets and to narrow equity gaps in retention.
  - Work to build MUS capacity to address student mental health and wellness supports that are prerequisites for retention and completion.
  
- 4. Career & Technical Education:** Expand efforts to effectively deliver career and technical education (CTE) for MUS students.
  - Establish and evaluate new accelerated degree pathways in in-demand fields (“Sprint Degrees”) in partnership with industry.
  - Engage K-12 partners to more effectively promote CTE opportunities through school counseling and advising strategies.
  - Improve on-ramps to CTE through dual enrollment, enhanced industry collaboration, and work-based learning opportunities.
  - Expand access to accelerated or stackable CTE credential pathways.

**5. Research:** Reinvigorate state-support for MT focused research and development.

- Identify nascent research strengths for potential system, state, or federal investment.
- Improve technology transfer supports and pathways that help innovations move from lab to market.
- Coordinate across state government and the private sector to build an agenda for technology-led economic development in Montana.

**6. Seamless Education:** Develop tools and resources that broaden and streamline access to the academic offerings of the MUS.

- Implement key technology upgrades that improve students access and facilitate collaboration, including a single, high-quality learning management system and a shared catalog and registration tool for online coursework.
- Broaden use of distance and hybrid learning, particularly for collaborative approaches that expand student access to in-demand programs.
- Continuously evaluate the university system's program mix, with the aim of reducing unnecessary duplication of academic offerings and addressing student demand through collaboration where possible.

**7. Performance-Based Funding:** Continue utilizing a performance funding model that contributes to the allocation of state funds.

- Analyze longitudinal student success results from under-represented student groups by campus.
- Utilize metric weights to increase emphasis on Regents' priorities.

**8. Enterprise Risk Management (ERM):** Provide leadership and coordination in the identification, management, and monitoring of systemwide risk/opportunities to advance the MUS mission.

- Continue to convene the Risk and Compliance Leadership Council and coordinate with campus risk officers.
- Incentivize campuses to identify shared affiliation and systemwide services through ERM funding opportunities.
- Continue to encourage systemwide participation in insurance discount programs offered by the Risk Management and Tort Defense Division.

**9. Communication & Advocacy:** Build on current communication and marketing efforts to increase support for higher education.

- Effectively communicate the University System's "product" to stakeholders.
- Devise methods to succinctly articulate the "value proposition" of attaining post-secondary degrees and certificates.

**10. Faculty and Staff Support:** Provide compensation and professional development adequate for recruiting and retaining faculty and staff.

## Guiding Principles

<https://www.mus.edu/data/strategic-plan/guiding-principles.html>

In order to provide a dynamic and effective strategic plan, the Board of Regents subscribes to the following Guiding Principles for the on-going development and review of the MUS Strategic Plan.

### **Systematic**

The planning and review cycle for the MUS Strategic Plan will take place over the course of a biennium, whereby the Plan is assessed, reviewed, and updated at the beginning of each biennium.

### **Accountable**

Outcomes and measurements of the strategic goals will be made public and communicated on a regular basis.

### **Inclusive**

The planning and review process will seek to include a broad array of stakeholders from throughout the state.

### **Flexible**

The MUS Strategic Plan is intended to be a flexible document that can adapt to the changing environment within higher education and throughout the state/nation.

### **Campus Connected**

Campus strategic plans will be connected to the broader strategic goals in the MUS Strategic Plan.

### **Statewide Focus**

The planning process will include a statewide focus on advancing higher education throughout the entire state.

### **National Context**

National trends and initiatives will be considered throughout the planning process and aid in the development of strategies and initiatives.

## **Planning Process**

The Board of Regents is committed to a biennial planning and review process that includes a broad array of University System stakeholders.

At the beginning of each biennium the MUS will hold a comprehensive planning meeting with representatives from MUS constituencies throughout the state. The goal of the meeting is to conduct a biennial review and update to the MUS Strategic Plan, including:

- review of key outcome measures and performance indicators;
- revisions and updates to strategic goals; and
- development and review of strategic initiatives

## College Participation

<https://mus.edu/data/strategic-plan/college-participation.html>

### Goal Statement

Prepare students for success in life through quality higher education

#### Goal 1: Access & Affordability

#### System Initiatives:

##### **Resident Student Access Initiative:**

A system-wide effort to develop a unified approach to resident student enrollment, financial aid, and success with goal of increasing the % of MT HS graduates who attend and graduate from the MUS. Action Steps = 1) Assess and expand MUS Central Application; 2) Launch "ApplyMontana" Portal; and 3) scale Montana 10 student success initiative

##### **GEAR UP (Gaining Early Awareness & Readiness for Undergraduate Programs):**

The purpose of this federal initiative is to increase the number of low-income students who are prepared to enter and succeed in postsecondary education. Montana GEAR UP provides college and career readiness services, such as tutoring, financial aid information, enrollment in rigorous academic courses, comprehensive mentoring, college visits, supplemental curriculum materials, and professional development for school staff. The program serves these students as they progress through middle and high school. In the 2012-13 academic year, ***the GEAR UP grant began funding the ACT test for all Montana high school juniors!***

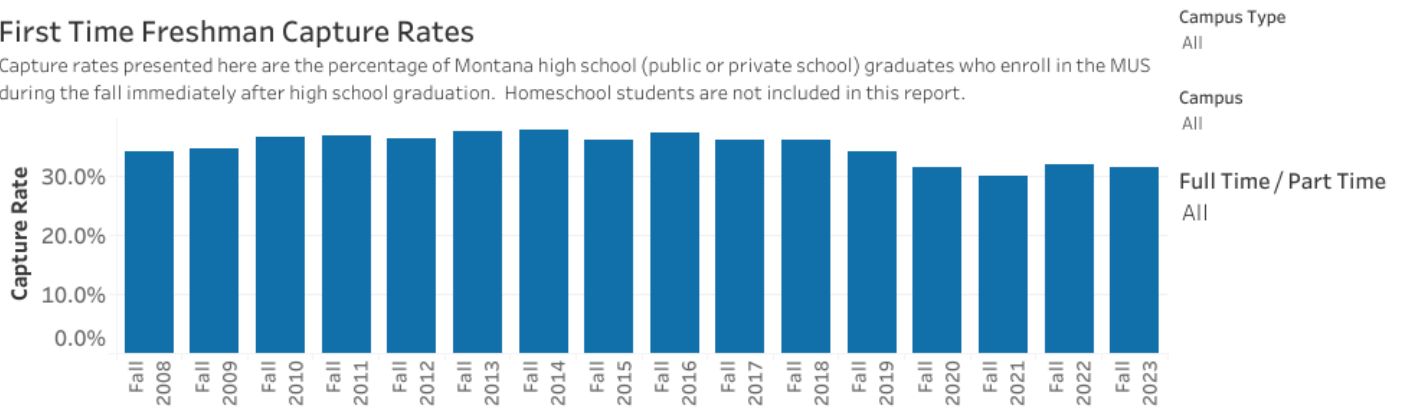
### Objective 1.1.1

Improve postsecondary education participation rates, with particular attention to Montana residents in MUS institutions

Metric 1.1.1

## First Time Freshman Capture Rates

Capture rates presented here are the percentage of Montana high school (public or private school) graduates who enroll in the MUS during the fall immediately after high school graduation. Homeschool students are not included in this report.



## Student Counts

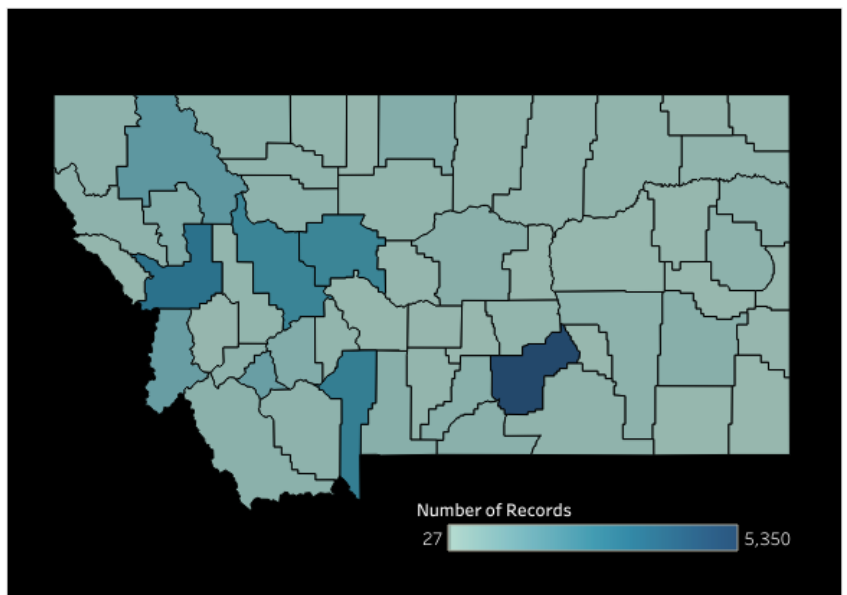
First Time Freshman only include Montana high school graduates who enrolled in the fall immediately after High School graduation.

Year	High School Graduates	First Time Freshmen	Capture Rate
Fall 2013	9,759	3,641	37.3%
Fall 2014	9,871	3,723	37.7%
Fall 2015	9,749	3,500	35.9%
Fall 2016	9,783	3,639	37.2%
Fall 2017	9,833	3,547	36.1%
Fall 2018	9,770	3,519	36.0%
Fall 2019	9,890	3,361	34.0%
Fall 2020	9,900	3,101	31.3%
Fall 2021	9,940	2,971	29.9%
Fall 2022	9,880	3,154	31.9%
Fall 2023	9,940	3,127	31.5%
Fall 2024	10,520		
Fall 2025	10,410		
Fall 2026	10,660		
Fall 2027	10,360		

\*Number of Graduates provided for this report is the number of projected High School graduates as determined by the Western In..

## First Time Freshman Recruits by County Since 2011

\*Data not available for Flathead Valley CC





## Retention and Completion

<https://mus.edu/data/strategic-plan/retention-completion.html>

### Goal Statement

Prepare students for success in life through quality higher education

#### Goal 1: Access & Affordability

##### System Initiatives:

MT Project 10

##### Goal Statement

Expand comprehensive student success program to additional institutions in the MUS to enhance system-wide retention and completion efforts.

##### Action Steps

1. Program Expansion: Develop campus plans with additional four-year and two-year campus partners to implement supports to accelerate academic progress, remove financial barriers to attendance, and increase students' purpose and belonging.
2. Serve Students: Continue to support initial cohort of 230 students and expand program to serve an additional 1,000 Pell-eligible and non-Pell-eligible students over two years.
3. Rigorously Evaluate: Partner with external evaluator to rigorously assess program implementation, student outcomes, and return on investment.
4. Sustainability: Actively seek multi-pronged funding approach that will support sustainable program delivery at participating campuses and expansion to other MUS institutions.

##### Objective 1.1.2

Increase retention rates within the Montana University System

[Metric 1.1.2](#)

##### Objective 1.1.3

Increase graduation rates within the Montana University System

[Metric 1.1.3](#)

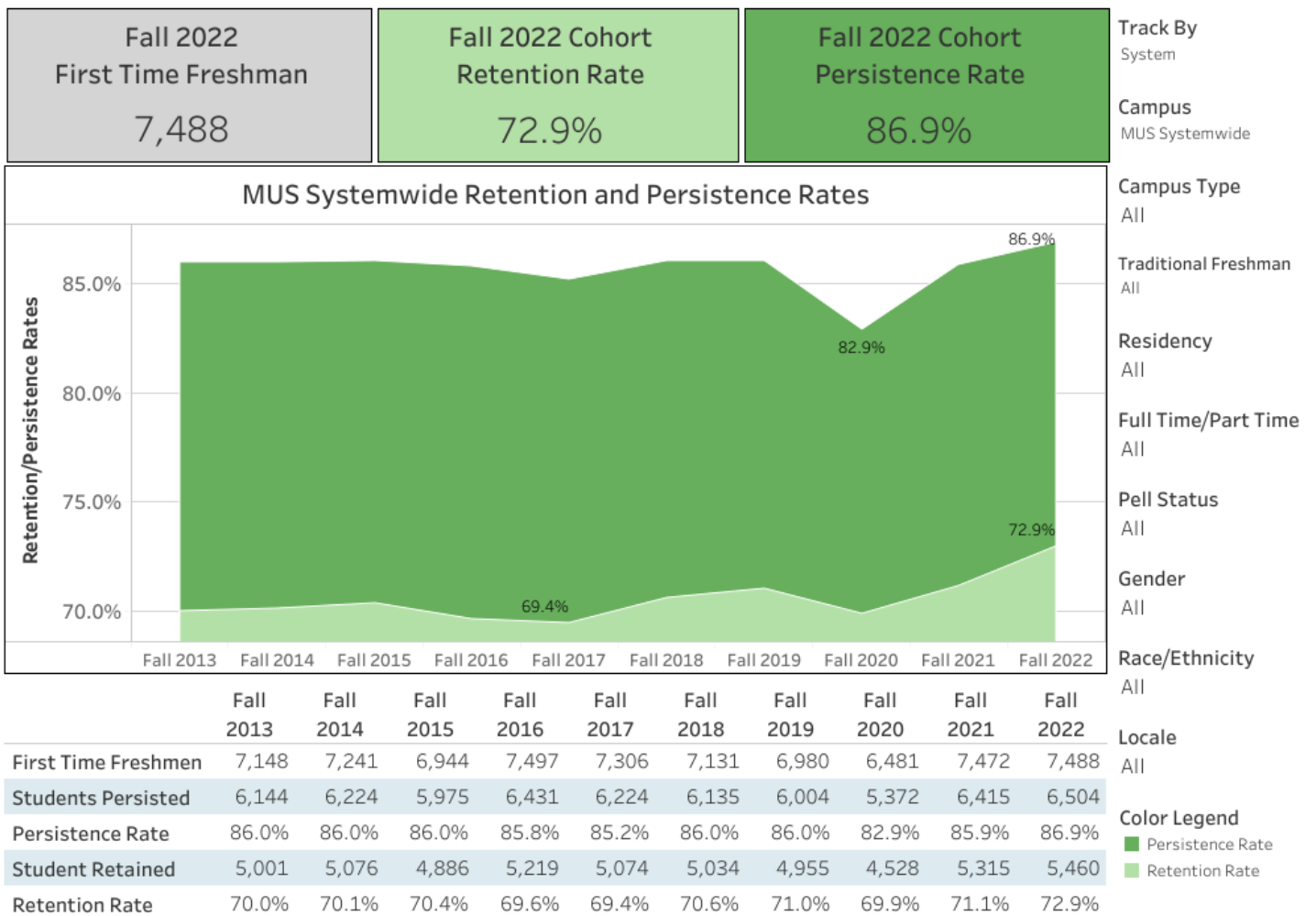
## Objective 1.1.2

Increase retention rates within the Montana University System

### Metric 1.1.2

#### MUS First Time Freshman Retention Rates

Percentage of first time freshman fall cohort returning for enrollment the following fall in the MUS (i.e. Retention rate for the Fall 2019 cohort is the percent of students returning in Fall 2020). Persistence rate is the percentage of the fall cohort that return in the spring of that academic year. In the Track By drop down select for Institution (retained or persisted at the same campus) or system (retained or persisted anywhere within the MUS).



## Objective 1.1.3

Increase graduation rates within the Montana University System

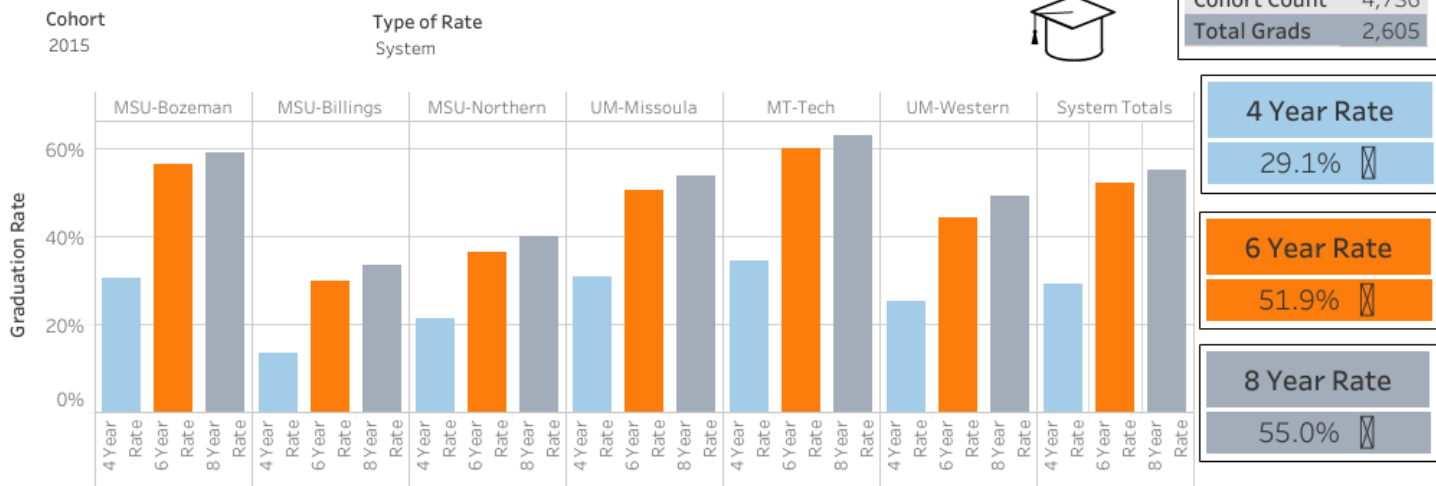
### Metric 1.1.3

#### MUS Bachelor's Degree Graduation Rates

Percentage of undergraduate students who graduate from a bachelor's degree program in 100% (4 Years), 150% (6 Years), and 200% (8 Years) of expected (full-time) program length. Cohort consists of first-time, full-time, Bachelor's Degree Seeking students from the fall semester (i.e. 2003 is the Fall of 2003 cohort of students). System rates include students that transferred and graduated from another MUS campus.

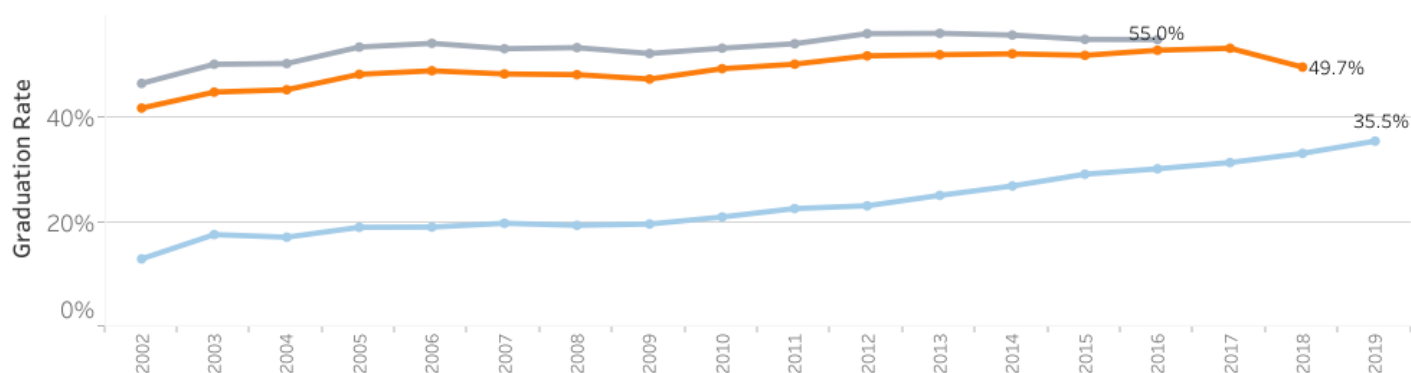


2015 Fall Cohort	
Cohort Count	4,736
Total Grads	2,605



Campus	Cohort	Cohort Count	3 Year Rate	4 Year Rate	5 Year Rate	6 Year Rate	7 Year Rate	8 Year Rate
All	2015	4,736	1.3%	29.1%	47.1%	51.9%	54.1%	55.0%

#### All Bachelor's Degree Graduation Rate Historical Trends



## Financial Aid

<https://www.mus.edu/data/strategic-plan/financial-aid.html>

### Goal Statement

Make higher education more affordable by offering more need-based financial aid and scholarships

#### Goal 1: Access & Affordability

##### MUS State Funded Need-based Aid Programs

Annually, MUS students collectively receive approximately \$40M per year in Federal Pell Grants. At MUS 2-year campuses, between 40% to 50% of first-time, full-time resident students receive Pell Grants, while at MUS 4-year Pell Grants are awarded to 30% to 35% of students. The Pell Grant represents 95% of the total need-based aid awarded in the MUS. MT Access Scholarship = \$1,000,000

##### MT Access Scholarship

**New in FY20**, the MUS embarked on a rejuvenated effort to provide state funded need-based aid. The 2019 Legislature appropriated \$1M per year for need-based aid, contingent on MUS campus foundations providing matching dollars.

As of November 2020, 95% of the matching funds have been raised for the biennium.

In FY20, approximately 2,000 students received MT Access awards of \$500 per semester.

##### Objective 1.2.1

Reduce the unmet student need for financial aid (increase need-based aid)

Metric 1.2.1

##### Objective 1.2.2

Increase the percentage of students who receive grants and scholarships, as well as the average amount awarded.

## Objective 1.2.1

Reduce the unmet student need for financial aid (increase need-based aid)

### Metric 1.2.1

## Need Based Financial Aid

### Academic Year Need Based Aid Received by First-time, Full-time Students

Includes all types of need based financial aid except loans in both Fall and Spring semesters. Average financial aid in this dashboard is the amount received only among the students who received need based aid. Only includes students enrolled in both fall and spring semesters.

Need based aid only includes State and Federal sources. Constant dollars show dollar amounts in current year dollars while Nominal Dollars are in dollars of that year.

School Type

All

Resident

Yes

Type of Dollars

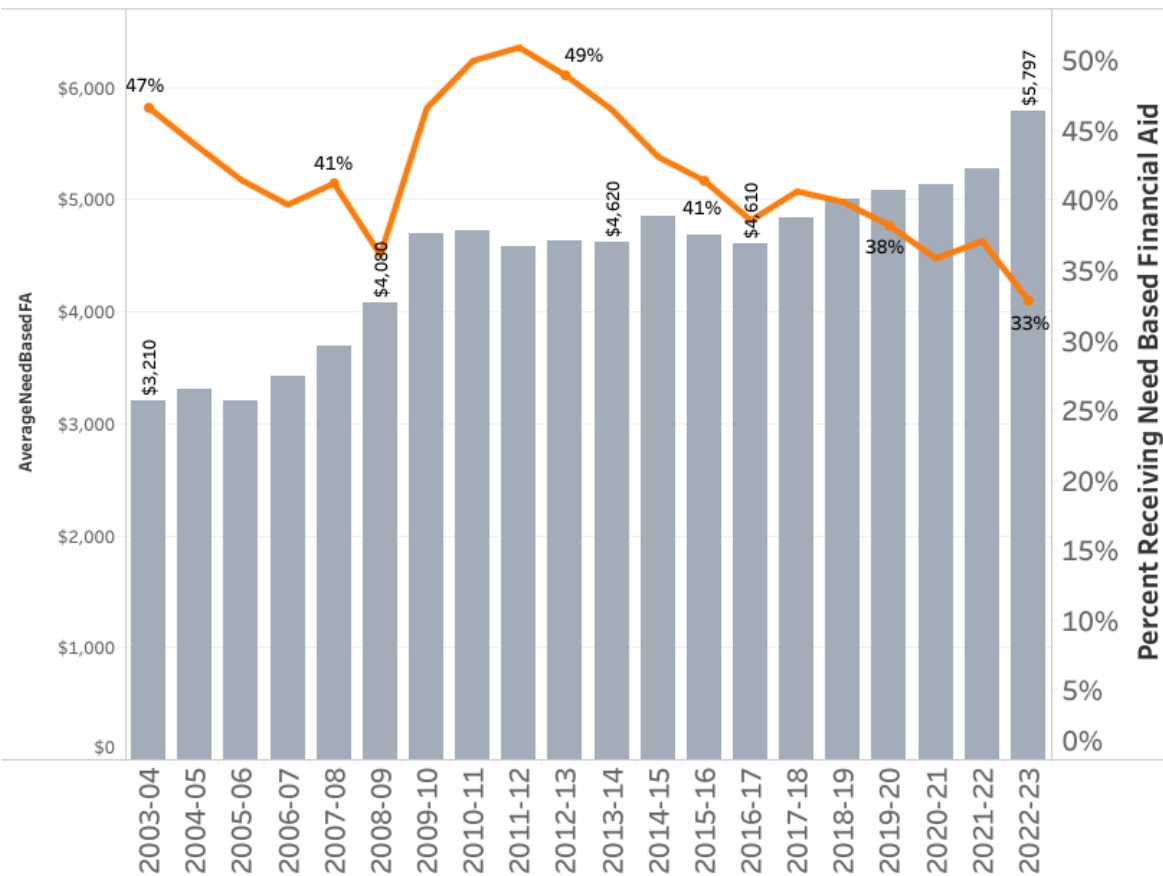
Nominal Dollars

Campus Name

- City College
- Dawson CC
- Gallatin College
- Great Falls College
- Helena College
- Highlands College
- Miles CC
- Missoula College
- MSU-Billings
- MSU-Bozeman
- MSU-Northern
- MT Tech
- UM-Missoula
- UM-Western

Measure Names

- % Receiving Aid
- AverageNeedBasedFA



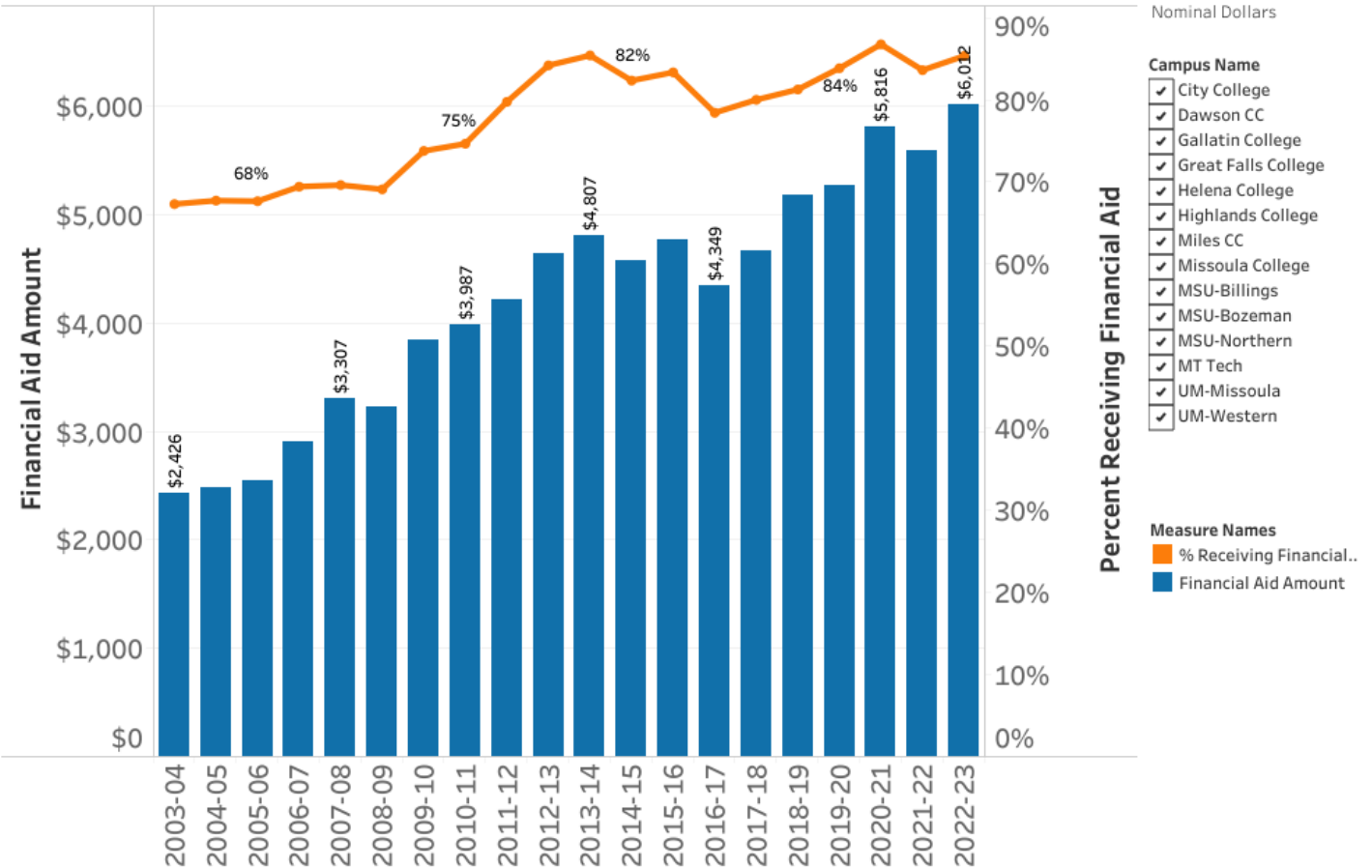
## Objective 1.2.2

Increase the percentage of students who receive grants and scholarships, as well as the average amount awarded.

### Financial Aid per Student

#### Academic Year Aid Received by First-time, Full-time Students

Includes all types of financial aid except loans in both Fall and Spring semesters. Average financial aid is the amount received by all students, not just those receiving aid. Only includes students enrolled in both fall and spring semesters. Constant dollars show dollar amounts in current year dollars while Nominal Dollars are in dollars of that year.



School Type

All

Resident

Yes

Type of Dollars

Nominal Dollars

Campus Name

- City College
- Dawson CC
- Gallatin College
- Great Falls College
- Helena College
- Highlands College
- Miles CC
- Missoula College
- MSU-Billings
- MSU-Bozeman
- MSU-Northern
- MT Tech
- UM-Missoula
- UM-Western

Measure Names

- % Receiving Financial..
- Financial Aid Amount

## Affordability

<https://www.mus.edu/data/strategic-plan/affordability.html>

### Goal Statement

Promote postsecondary education affordability

#### Goal 1: Access & Affordability

##### System Initiatives: Tuition Freeze:

- Freeze on tuition for 14 out of 15 years at all two- year colleges (FY08 – FY17, FY20-FY22).
- Regional 4-year campuses (Tech, MSUN, MSUN, and UMW) tuition frozen for 11 out of 15 years since
- MSU and UM, tuition frozen during 9 of the past 15 years.

##### Regional Comparison 2020-21:

(avg. academic year tuition and fees for full-time resident students)

MSU/UM = \$7,392

Regional Peers = \$9,745

MSUB, UMW, MSUN = \$5,897

Regional Peers = \$7,797

Special Focus (MT Tech) = \$7,397

Regional Peers = \$11,247

MUS 2-yr Colleges = \$3,907

Regional Peers = \$4,314

##### Financial Literacy:

Campuses in the MUS are taking a coordinated and collaborative approach toward decreasing student loan debt. Assisted by grant funds obtained by OCHE, efforts to educate and communicate to students and parents the various resources available for paying for college, as well as improving students' abilities to manage their own finances are now occurring on all MUS campus.

##### Objective 1.3.1

Decrease average loan amounts and the percentage of students borrowing

##### Objective 1.3.2

Decrease tuition as a percentage of median household income

##### Objective 1.3.3

Increase the amount of state support as a percentage of total personal income relative to peer states and historical levels

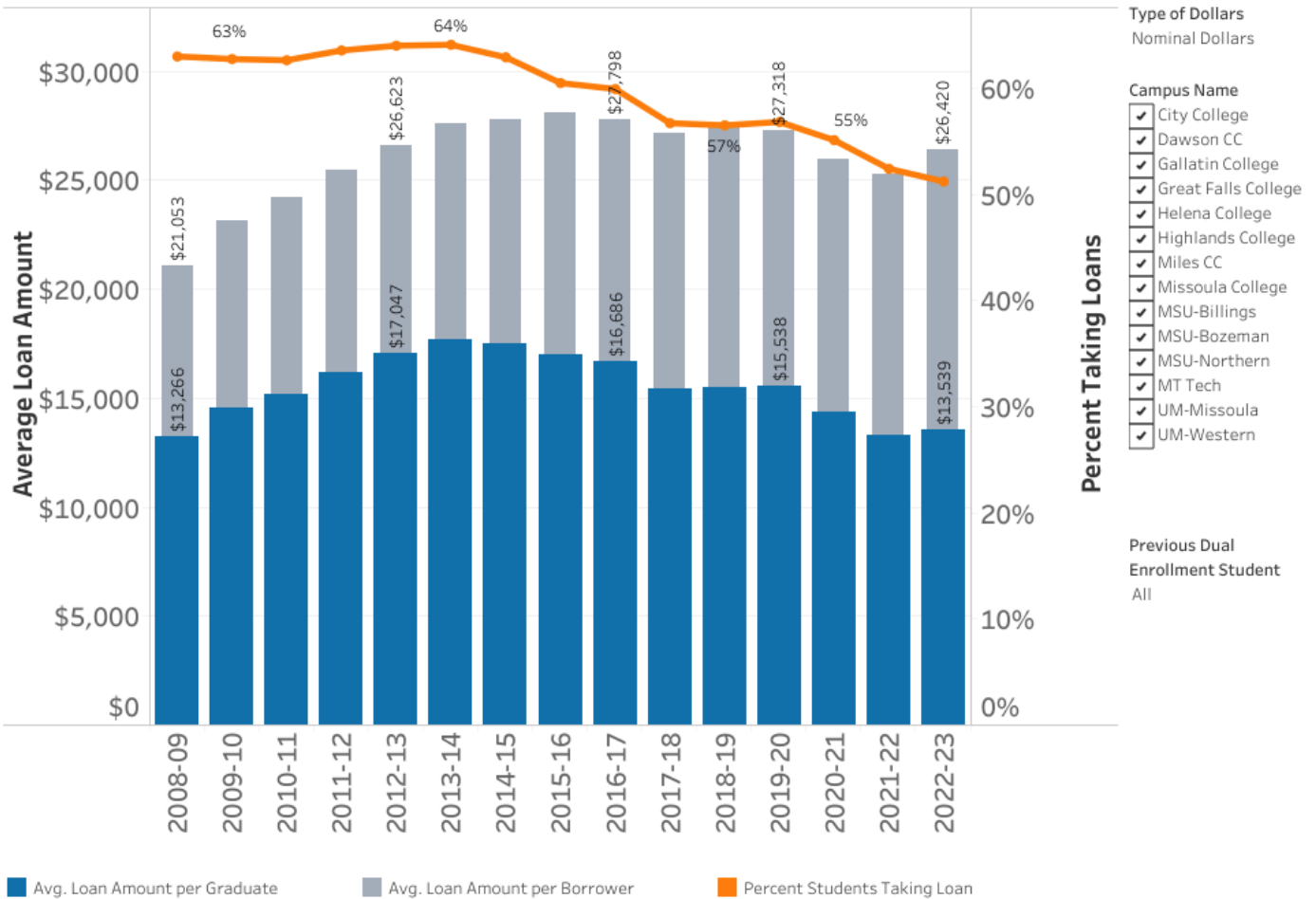
## Objective 1.3.1

Decrease average loan amounts and the percentage of students borrowing

### Loan Amounts for Degree Recipients

#### Percent of Students taking out Loans

Constant dollars show dollar amounts in current year dollars while Nominal Dollars are in dollars of that year. (no parent PLUS loans included; includes Dawson CC and Miles CC)





## Objective 1.3.2

Decrease tuition as a percentage of median household income

### Tuition & Fees as a Percent of Household Income

If a state doesn't show up it reflects that no schools of that type exist within the state.

\*Tuition and Fees Data Source: Western Interstate Commission for Higher Education (WICHE), *Tuition and Fees in the West*

\*Median Household Income Data Source: Census Bureau, 1 Year American Community Survey

School Sector  
Doctoral Universities

Student Level  
Undergraduate

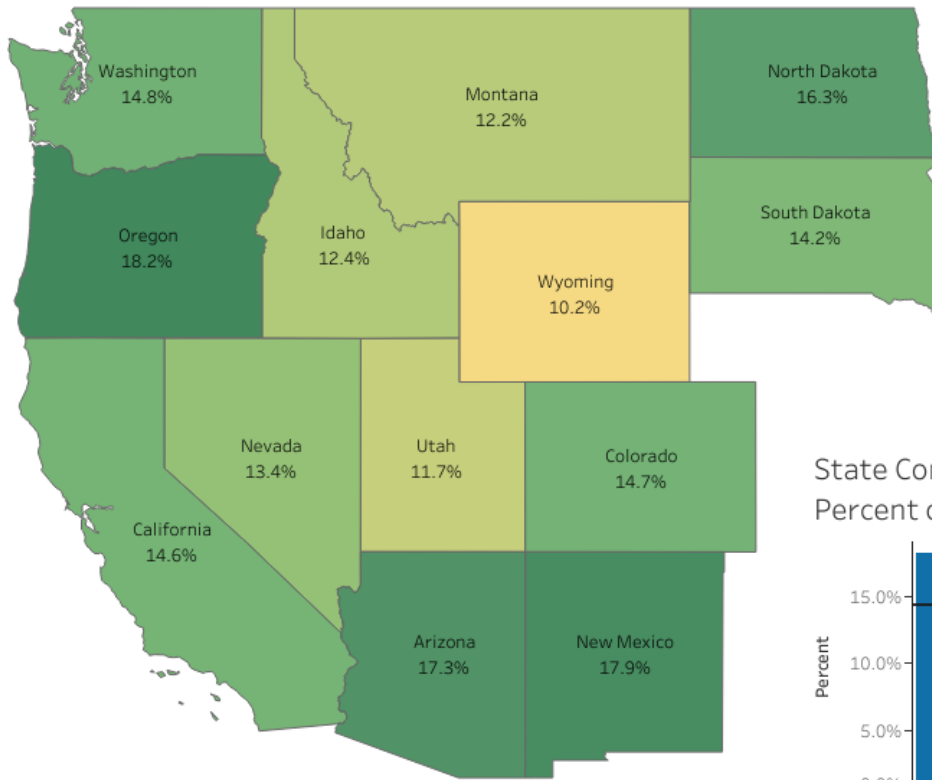
Resident Status  
Resident

Year  
2022-23

#### Montana Campuses

2022-23 Tuition & Fees as a Percent of Household Income

Montana State University	12.2%
University of Montana	12.2%



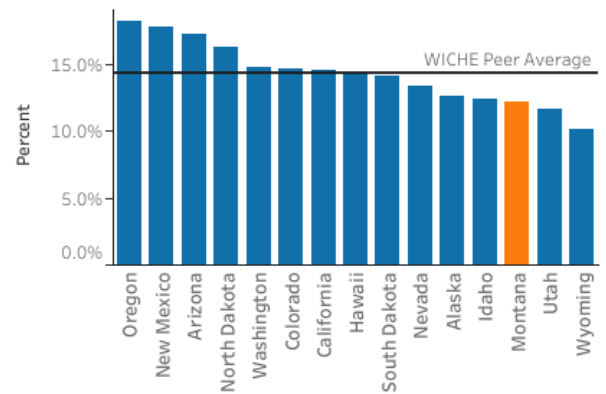
WICHE Average

14.3%

Percent of Household Income

10.2% 18.2%

### State Comparison of Tuition & Fees as a Percent of Household Income

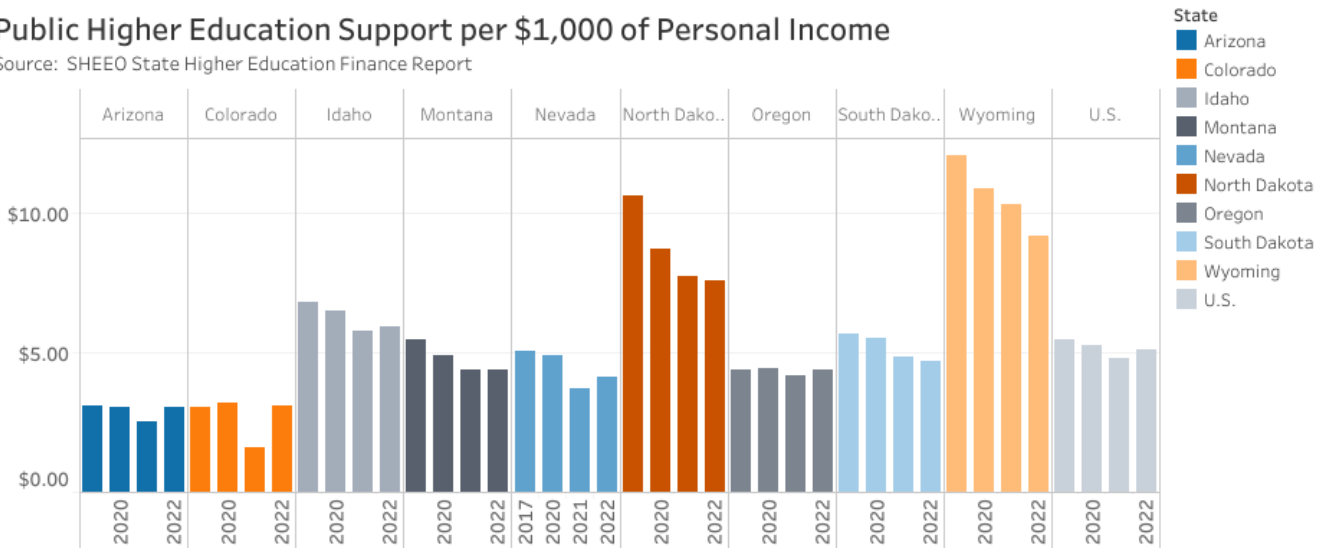


## Objective 1.3.3

Increase the amount of state support as a percentage of total personal income relative to peer states and historical levels

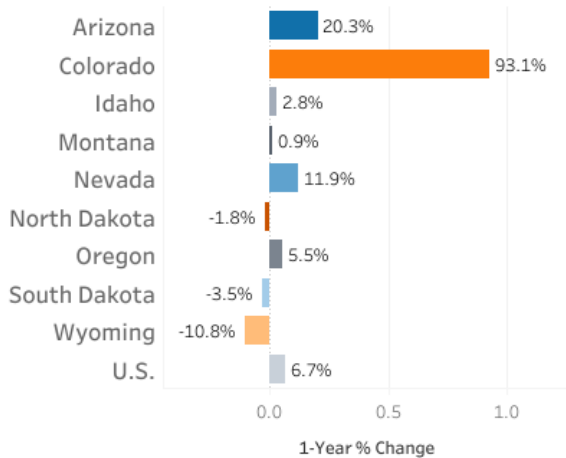
### Public Higher Education Support per \$1,000 of Personal Income

Source: SHEEO State Higher Education Finance Report



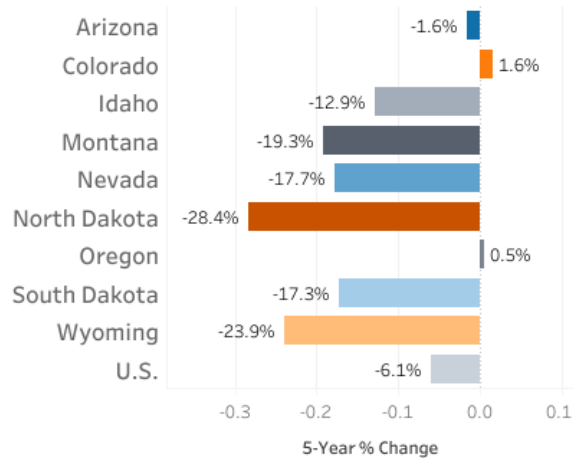
### 1 Year Percent Change in Support

Change from 2021 to 2022



### 5 Year Percent Change in Support

Change from 2017 to 2022



## K - 20 Collaboration

<https://www.mus.edu/data/strategic-plan/k20.html>

### Goal Statement

Work collaboratively with the K-12 education system to increase high school academic preparedness, completion, and concurrent enrollment programs

#### Goal 1: Access & Affordability

##### System Initiatives: Dual Enrollment

### Goal Statement

Increase capacity, awareness, and opportunities for Dual Enrollment in Montana.

### Action Steps

1. Continue with 12Free program (first 6 credits for free)
2. Expand communication of Dual Enrollment opportunities through the new College Access Portal
3. Explore ways to centralized dual enrollment registration.  
Measure

### Measure

Target = increase the annual number of dual enrolled students by 10%

#### Objective 1.4.1

Increase enrollment of at-risk and disadvantaged students

Metric 1.4.1

#### Objective 1.4.2

Expand outreach to top academic achievers graduating from Montana high schools

Metric 1.4.2

#### Objective 1.4.3

Increase early access to higher education through dual enrollment

Metric 1.4.3

## Objective 1.4.1

Increase enrollment of at-risk and disadvantaged students

### Metric 1.4.1

### MUS Enrollment Demographics

Headcounts are based on Census data snapshots taken during the 3rd week of the term. Terms prior to Fall 2016 do not include FVCC. Hover the mouse cursor over the bars and numbers in the tables for more statistics regarding the headcounts.

Measurement Period  
Fall

Group By  
Gender

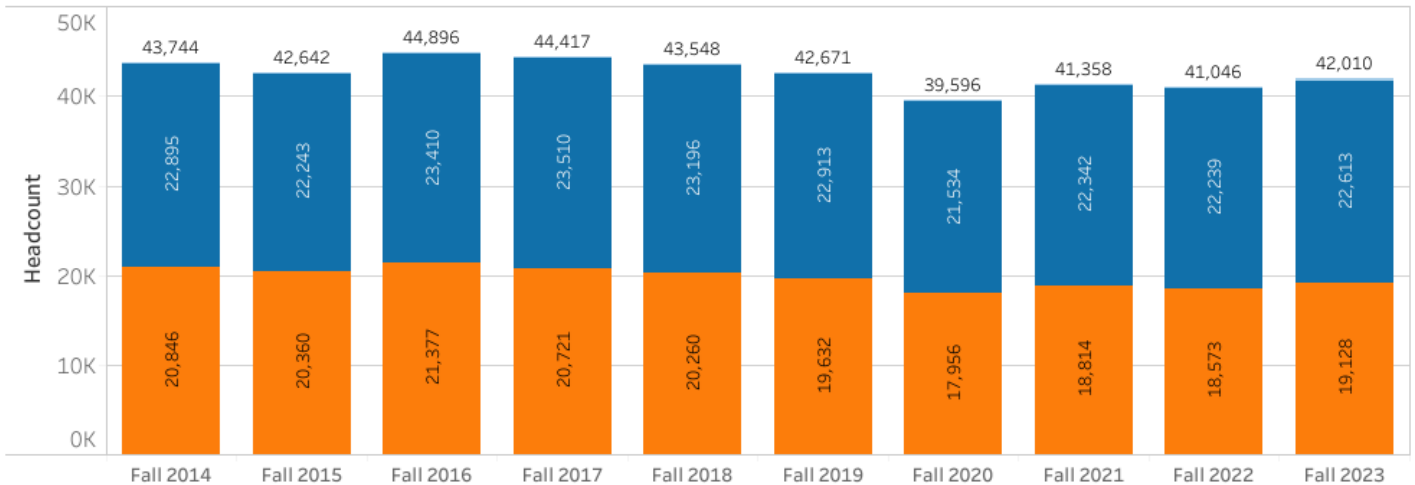
Locale  
All

Campus  
All

**Grouping**

- Unknown
- Female
- Male

<h3 style="margin: 0;">Fall 2023 Headcount</h3> <p style="font-size: 24px; margin: 0;">42,010</p>	<h3 style="margin: 0;">Headcount Percent Change</h3> <p style="font-size: 12px; margin: 0;">Compared to Previous Year</p> <p style="font-size: 24px; margin: 0;">2.3%</p>
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### MUS Headcounts

	Fall 2014	Fall 2015	Fall 2016	Fall 2017	Fall 2018	Fall 2019	Fall 2020	Fall 2021	Fall 2022	Fall 2023
Unknown	3	39	109	186	92	126	106	202	234	269
Female	22,895	22,243	23,410	23,510	23,196	22,913	21,534	22,342	22,239	22,613
Male	20,846	20,360	21,377	20,721	20,260	19,632	17,956	18,814	18,573	19,128
<b>Grand Total</b>	<b>43,744</b>	<b>42,642</b>	<b>44,896</b>	<b>44,417</b>	<b>43,548</b>	<b>42,671</b>	<b>39,596</b>	<b>41,358</b>	<b>41,046</b>	<b>42,010</b>

## Objective 1.4.2

Expand outreach to top academic achievers graduating from Montana high schools

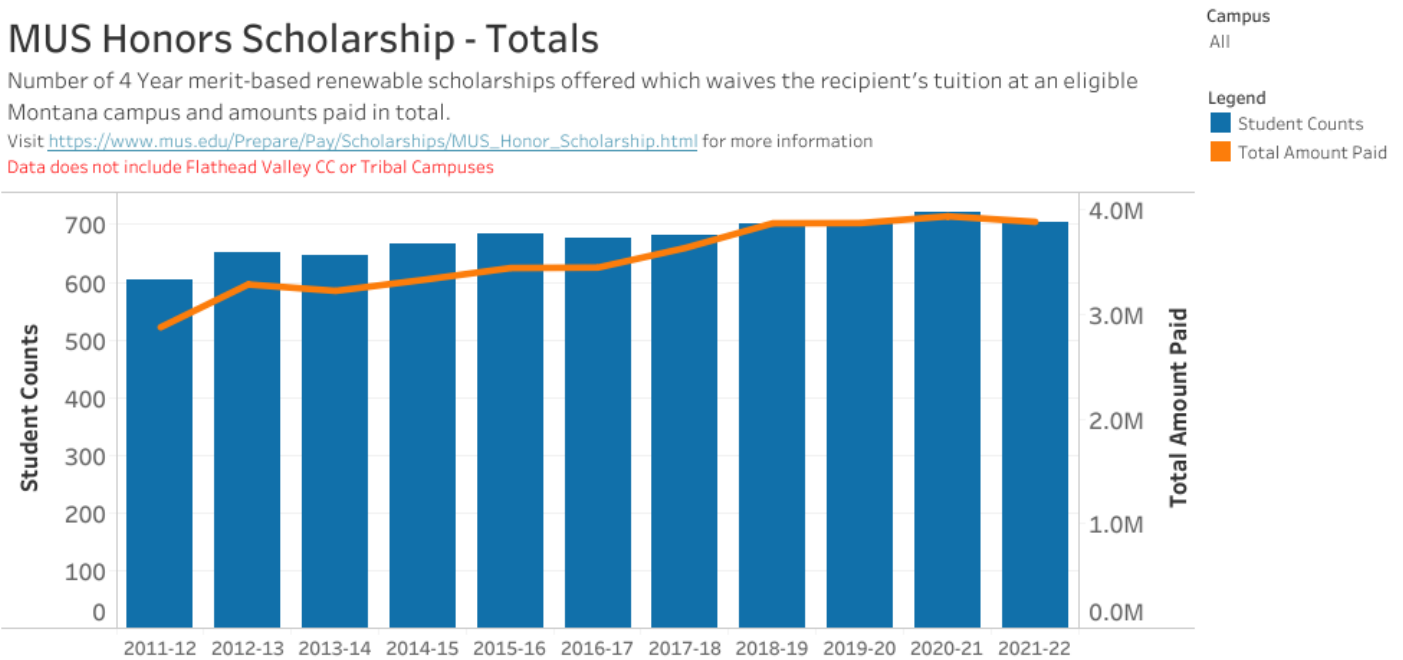
### Metric 1.4.2

## MUS Honors Scholarship - Totals

Number of 4 Year merit-based renewable scholarships offered which waives the recipient's tuition at an eligible Montana campus and amounts paid in total.

Visit [https://www.mus.edu/Prepare/Pay/Scholarships/MUS\\_Honor\\_Scholarship.html](https://www.mus.edu/Prepare/Pay/Scholarships/MUS_Honor_Scholarship.html) for more information

Data does not include Flathead Valley CC or Tribal Campuses



### Student Counts and Amounts Paid

	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
Student Counts	603	652	645	666	683	675	681	701	707	720	703
Total Amount Paid	\$2,876,868	\$3,285,495	\$3,224,360	\$3,329,492	\$3,442,756	\$3,447,135	\$3,634,951	\$3,870,405	\$3,872,565	\$3,937,378	\$3,883,907
Average Amount Paid Per Semester	\$2,393	\$2,529	\$2,531	\$2,553	\$2,552	\$2,565	\$2,685	\$2,772	\$2,772	\$2,755	\$2,758
First Time MUS Honors Students	179	204	206	196	207	211	200	214	205	215	207

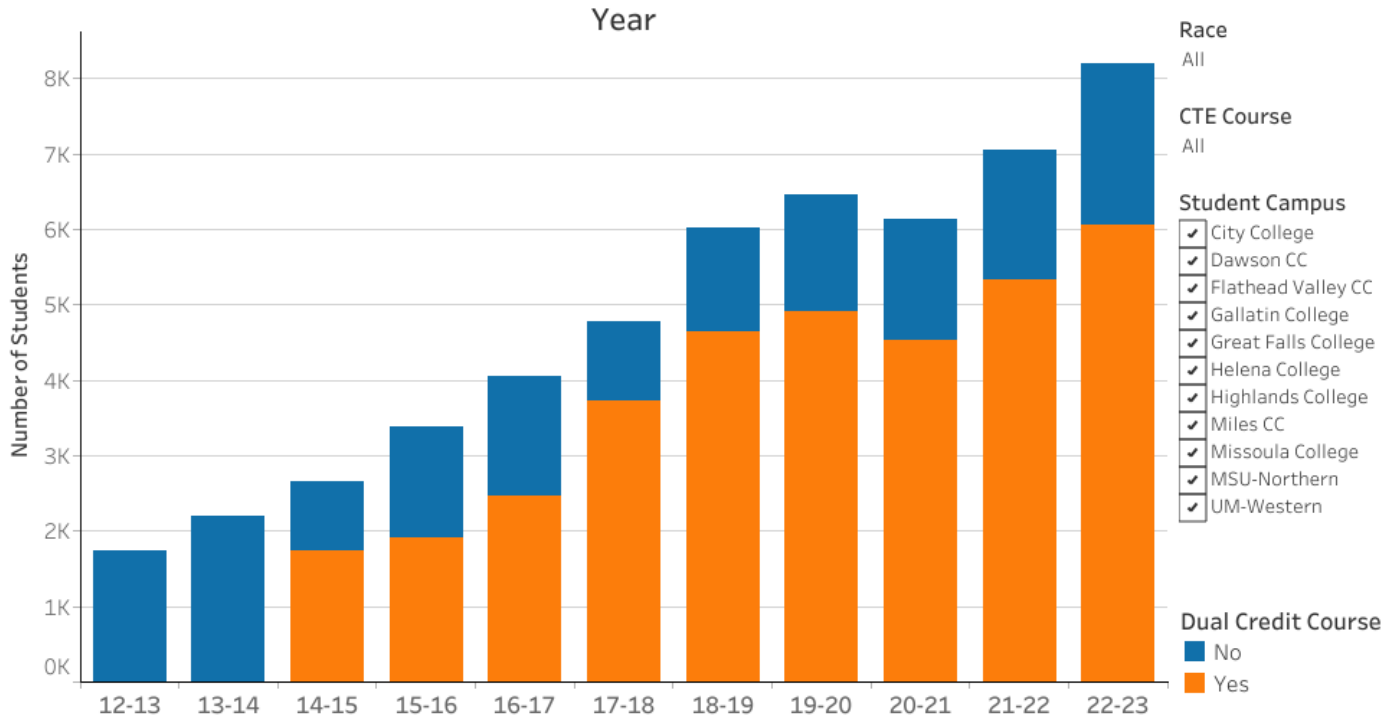
## Objective 1.4.3

Increase early access to higher education through dual enrollment

### Metric 1.4.3

#### Dual Enrollment System Totals - Students

Annual number of high school students (age 19 or younger) enrolled in at least one college class; all counts are unduplicated counts (a student that takes dual enrollment in both the spring and fall will only be counted once if both terms are selected). Dual credit classes are taught in the high school and students are granted both high school and college credit for the class. Totals are not the sum of the columns because a student may be taking both a dual credit course and one that is not.



#### Dual Enrollment Type

	Year										
Dual Credit Course	12-13	13-14	14-15	15-16	16-17	17-18	18-19	19-20	20-21	21-22	22-23
No	1,735	2,192	915	1,476	1,587	1,059	1,374	1,564	1,608	1,715	2,147
Yes			1,739	1,906	2,457	3,721	4,645	4,903	4,535	5,340	6,060
<b>Grand Total</b>	<b>1,735</b>	<b>2,192</b>	<b>2,564</b>	<b>3,308</b>	<b>3,943</b>	<b>4,603</b>	<b>5,733</b>	<b>6,112</b>	<b>5,752</b>	<b>6,577</b>	<b>7,621</b>

## Two-Year Education

<https://www.mus.edu/data/strategic-plan/two-year.html>

### Goal Statement

Increase postsecondary enrollment of traditional and non-traditional students through expanded outreach programs, evening/weekend programs, and 2-year programs

#### Goal 1: Access & Affordability

### System Initiatives: 2-year Education/CTE

#### Goal Statement

Expand efforts to communicate and effectively deliver career and technical education (CTE) as an option for students to pursue in the MUS.

#### Action Steps

(Shared Policy Goal)

1. Develop a College and Career Readiness (CCR) Portal that equally promotes CTE and non- CTE opportunities.
2. Work with k-12 partners and MUS campuses to more effectively promote CTE opportunities through school counseling and advising strategies.
3. Continuously review the effectiveness of existing CTE programs and conduct gap analyses to guide the development of new CTE opportunities that more effectively meet workforce demand.
4. Explore avenues for developing a system-level approach for the recruitment of students interested in CTE.

#### Measure

Target = grow CTE enrollment system-wide by 10%

#### Objective 1.5.1

Increase enrollment at 2-year programs.

Metric 1.5.1

#### Objective 1.5.2

Increase programs and classes for non-traditional students, including evening and weekend programs

Metric 1.5.2

## Objective 1.5.1

Increase enrollment at 2-year programs.

### Metric 1.5.1

#### MT University System Enrollment for Entire System

This dashboard presents information on FTE for the MUS as a system. Census data prior to Fall 2016 is not available for Flathead Valley Community College and is excluded from totals for those periods. Please see our Headcount dashboard at <https://mus.edu/data/dashboards/headcount.asp> for headcount and demographic information. **Census records are not gathered for Summer or Fiscal Year and are only available for this dashboard to 2010. If selected a blank page will be displayed.**

Measurement Period  
Fall

Event Type  
Census

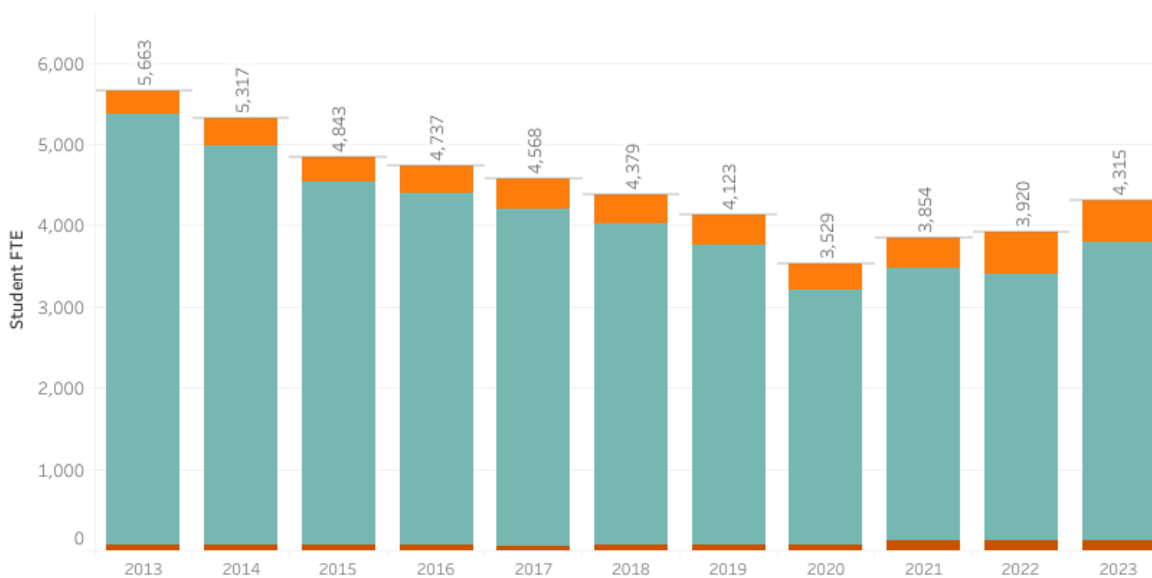
Campus Type  
2 Year

Fiscal Year  
Multiple values

Residency  
All

Student Population  
Multiple values

Student Population  
■ Non-Resident Undergr..  
■ Resident Undergradu..  
■ WUE



Residency	Student Population	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Resident	Resident U..	5,291	4,915	4,477	4,327	4,155	3,948	3,695	3,129	3,354	3,282	3,656
	Total	5,291	4,915	4,477	4,327	4,155	3,948	3,695	3,129	3,354	3,282	3,656
Non-Reside..	Non-Reside..	299	328	297	332	358	363	355	324	382	515	526
	WUE	73	73	70	78	54	69	73	77	117	123	132
	Total	372	402	366	410	412	432	428	401	499	638	658
<b>Total</b>		<b>5,663</b>	<b>5,317</b>	<b>4,843</b>	<b>4,737</b>	<b>4,568</b>	<b>4,379</b>	<b>4,123</b>	<b>3,529</b>	<b>3,854</b>	<b>3,920</b>	<b>4,315</b>



## Objective 1.5.2

Increase programs and classes for non-traditional students, including evening and weekend programs

### Metric 1.5.2

### MUS Enrollment Demographics

Headcounts are based on Census data snapshots taken during the 3rd week of the term. Terms prior to Fall 2016 do not include FVCC. Hover the mouse cursor over the bars and numbers in the tables for more statistics regarding the headcounts.

Measurement Period  
Fall

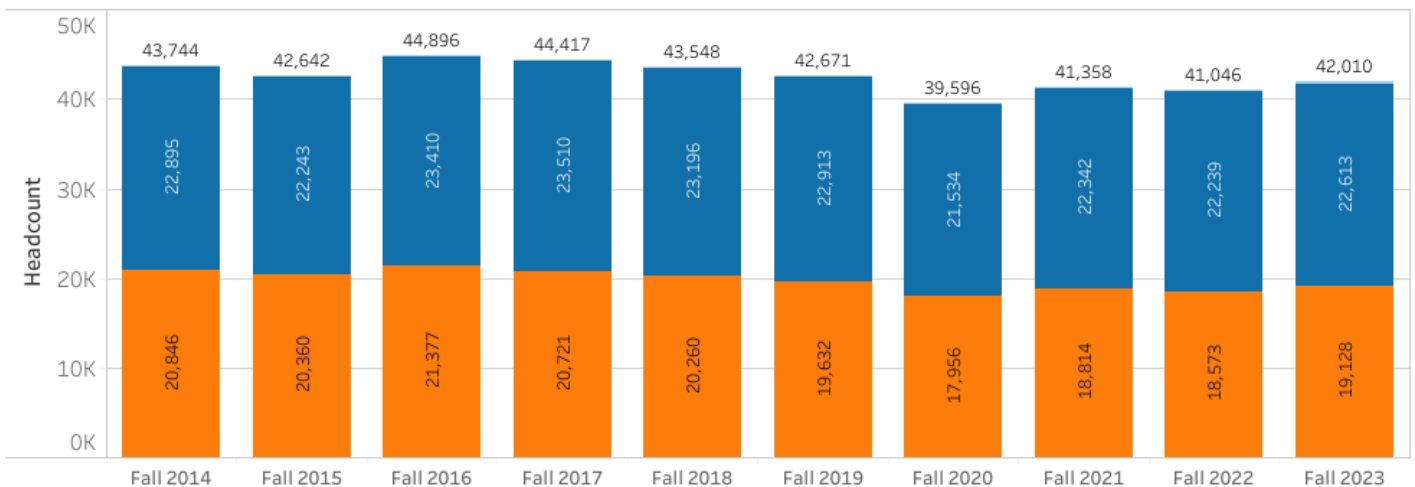
Group By  
Gender

Locale  
All

Campus  
All

Grouping  
 Unknown  
 Female  
 Male

<b>Fall 2023 Headcount</b> <b>42,010</b>	<b>Headcount Percent Change</b> <small>Compared to Previous Year</small> <b>2.3%</b>
---	--



### MUS Headcounts

	Fall 2014	Fall 2015	Fall 2016	Fall 2017	Fall 2018	Fall 2019	Fall 2020	Fall 2021	Fall 2022	Fall 2023
Unknown	3	39	109	186	92	126	106	202	234	269
Female	22,895	22,243	23,410	23,510	23,196	22,913	21,534	22,342	22,239	22,613
Male	20,846	20,360	21,377	20,721	20,260	19,632	17,956	18,814	18,573	19,128
<b>Grand Total</b>	<b>43,744</b>	<b>42,642</b>	<b>44,896</b>	<b>44,417</b>	<b>43,548</b>	<b>42,671</b>	<b>39,596</b>	<b>41,358</b>	<b>41,046</b>	<b>42,010</b>

## Distance Learning

<https://www.mus.edu/data/strategic-plan/distance-learning.html>

### Goal Statement

Improve distance and on-line learning by coordinating online delivery of education across the entire Montana University System

#### Goal 1: Access & Affordability

#### System Initiatives: MUS Distance Learning Initiative:

In the 2005 and 2007 legislative sessions, the Montana Legislature appropriated funds specifically aimed at increasing the availability of distance learning in the Montana University System.

With these funds (\$300,000 in 2005, \$900,000 in 2007) the university system invested in distance learning resources, faculty, and infrastructure. As a result, Montana universities and colleges now offer more than 100 online degrees and over 700 internet courses.

MUS.edu/online is a central location for students, faculty, and the public to find information on distance education opportunities and topics in the MUS.

#### **Objective 1.6.1**

Increase student enrollment in online courses

Metric 1.6.1

#### **Objective 1.6.2**

Increase the number of online courses and degrees

Metric 1.6.1

## Objective 1.6.1

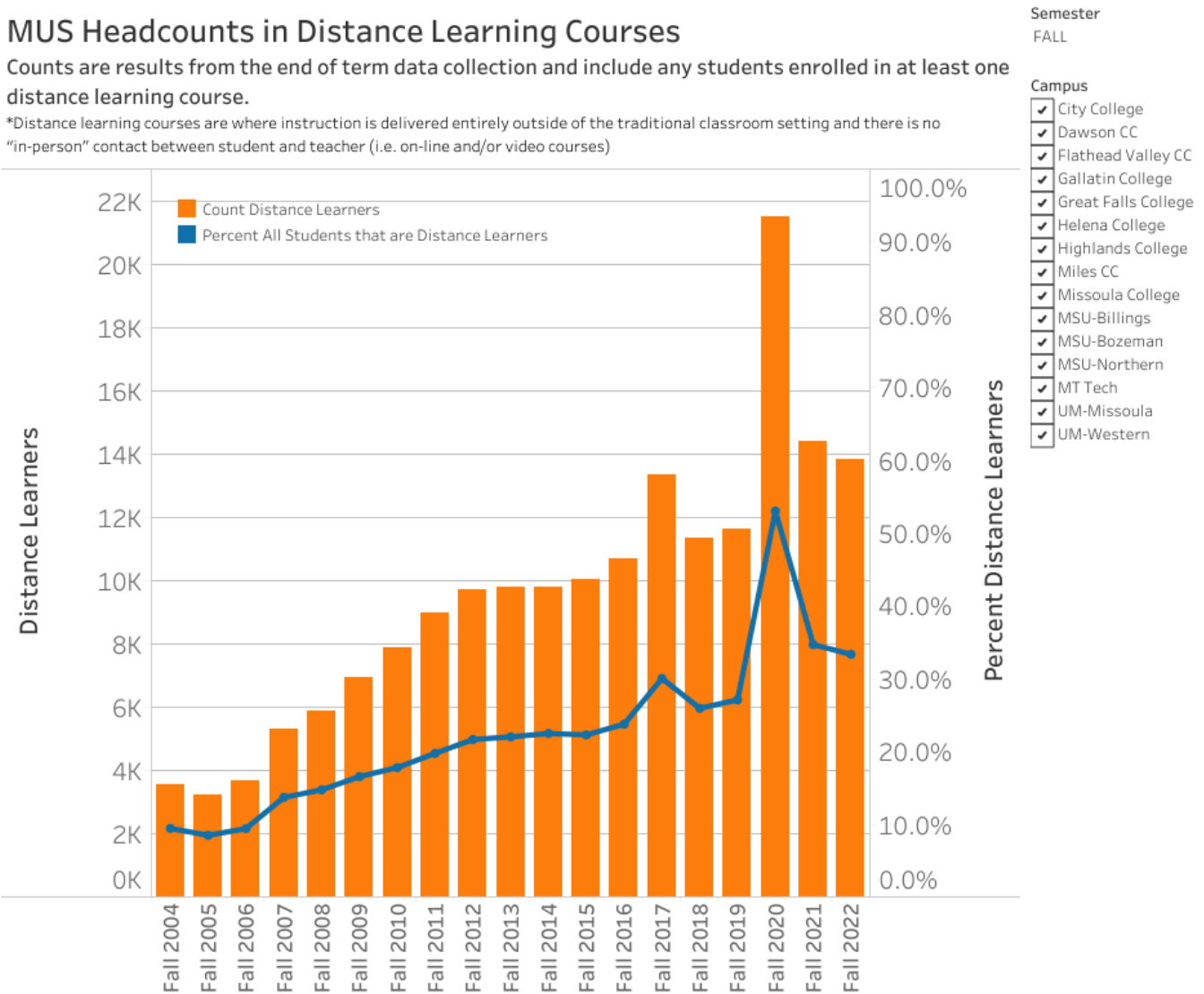
Increase student enrollment in online courses

Metric 1.6.1

### MUS Headcounts in Distance Learning Courses

Counts are results from the end of term data collection and include any students enrolled in at least one distance learning course.

\*Distance learning courses are where instruction is delivered entirely outside of the traditional classroom setting and there is no "in-person" contact between student and teacher (i.e. on-line and/or video courses)



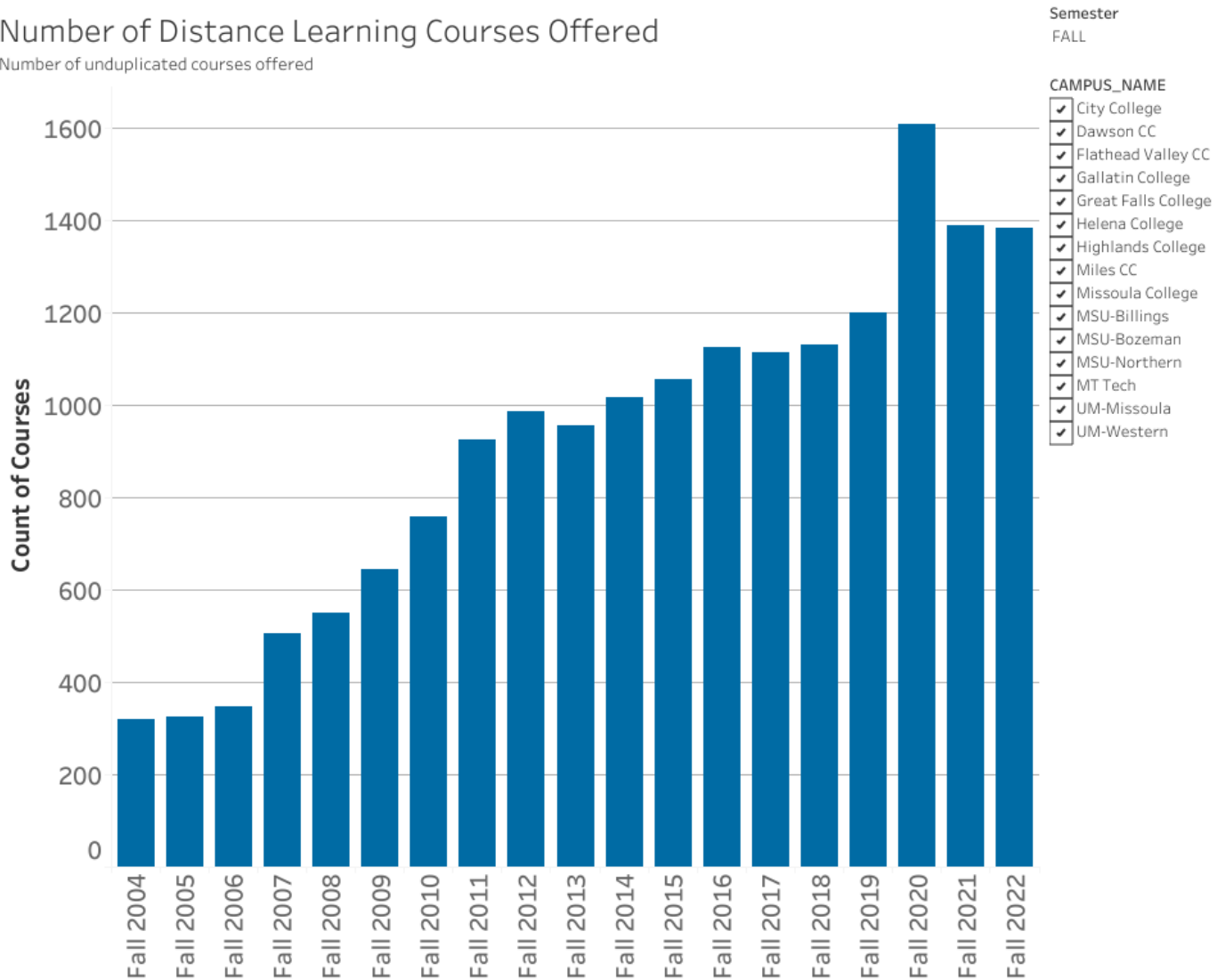
## Objective 1.6.2

Increase the number of online courses and degrees

### Metric 1.6.1

#### Number of Distance Learning Courses Offered

Number of unduplicated courses offered



## Workforce Development

<https://www.mus.edu/data/strategic-plan/workforce-development.html>

### Goal Statement

Increase responsiveness to workforce development needs by expanding and developing programs in high demand fields in the state.

#### Goal 2: Workforce & Economic Development

#### System Initiatives:

##### MT STEM Scholarship

The 2019 Legislature revitalized the MT STEM Scholarship by shifting Lottery funding from last dollar to first dollar and extending the number of years that students can receive scholarships from two to four. Award amounts are \$1,000 in the first year, \$1,500 in years two and three, and \$2,000 in year four.

##### CTE/Big Sky Pathways

In collaboration with OPI, K-12 school districts, two-year colleges, and business and industry, develop and promote sequential curriculum providing high school students with a clear, non-duplicative pathway from high school to two-year colleges and/or careers.

#### Objective 2.1.1

Increase degrees and certificates awarded in high-demand occupational fields

Metric 2.1.1

#### Objective 2.1.2

Increase job placement rates

Metric 2.1.2

#### Objective 2.1.3

Increase the number of certificates and degrees conferred in 2-year programs

Metric 2.1.3

Degrees & Certificates Awarded by MUS 2-year Colleges

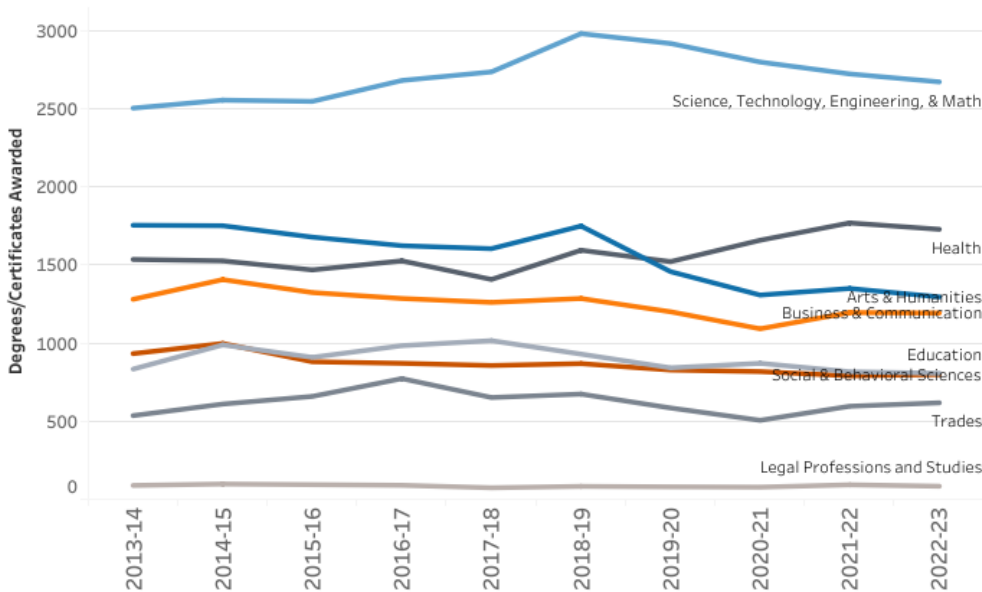
## Objective 2.1.1

Increase degrees and certificates awarded in high-demand occupational fields

### Metric 2.1.1

#### MUS Degrees & Certificates Awarded by Discipline

Academic Year consists of Summer, Fall, and Spring terms (ex: 2018-19 includes Summer 2018, Fall 2018, Spring 2019)  
 Hover the cursor over the graph or year to change the Academic Year metrics.



Award Type  
All

Campus  
All

Campus Type  
All

Discipline Area  
All

Description of Major  
CIP 4 Codes used to determine description

All

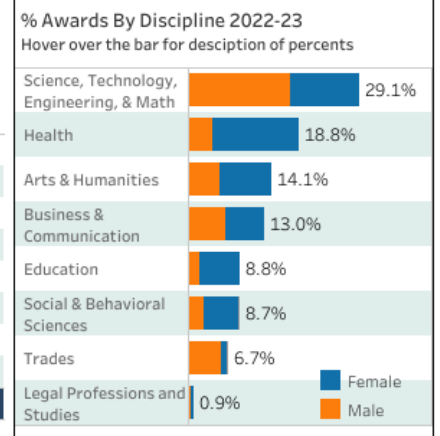
**2022-23 Total Degrees**  
**8,665**

Graduate Degrees  
1,925

BA Degrees  
4,758

AA Degrees  
1,334

Certificates  
648



#### Count of Awards by Discipline

	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Arts & Humanities	1,755	1,752	1,679	1,624	1,605	1,750	1,458	1,308	1,350	1,296
Business & Communication	1,281	1,407	1,324	1,286	1,261	1,286	1,201	1,092	1,196	1,193
Education	834	989	909	984	1,016	930	842	871	817	807
Health	1,536	1,527	1,469	1,527	1,408	1,595	1,522	1,659	1,770	1,729
Legal Professions and Studies	89	98	94	90	74	83	80	78	93	84
Science, Technology, Engineering, & Math	2,505	2,556	2,548	2,682	2,737	2,982	2,919	2,800	2,724	2,673
Social & Behavioral Sciences	933	998	881	871	857	869	828	818	791	799
Trades	536	610	659	773	652	674	585	506	596	618
<b>Grand Total</b>	<b>9,469</b>	<b>9,937</b>	<b>9,563</b>	<b>9,837</b>	<b>9,610</b>	<b>10,169</b>	<b>9,435</b>	<b>9,132</b>	<b>9,337</b>	<b>9,199</b>

## Objective 2.1.2

Increase job placement rates

Metric 2.1.2

### Student Success In Workforce

This dashboard tracks MUS students after school and into the workforce. Data included only includes wage data from Montana. Any out of state wages earned will not be included. To allow time for a student to acquire a job after school the 1 year wage data starts a year after the student graduates or their last enrollment. Only students that are employed for the full year are included in salary data. Salary amounts may be displayed in constant dollars (2023 dollars) or nominal dollars (actual dollars earned that year). Selecting "Null" for Highest Degree Level represents students that attended the MUS but did not receive any credential. Data included is since the 2001 school year. Any data with counts of less than 5 students is masked.

Type of Dollars  
Constant

Time After Graduation  
1 Year

Highest Degree Attained  
All

Year of Degree Earned  
Or Last Enrollment  
for Non-Completers  
All

First Campus Name  
Campus student started out at  
All

Graduating Campus  
Campus of Highest Degree Earned  
All

Discipline  
All

Major Area  
All

Gender  
All

Pell Status  
All

Race/Ethnicity  
All

Student Resident Status  
All

Grouping  
 None  
 Associate Degree  
 Bachelor's Degree

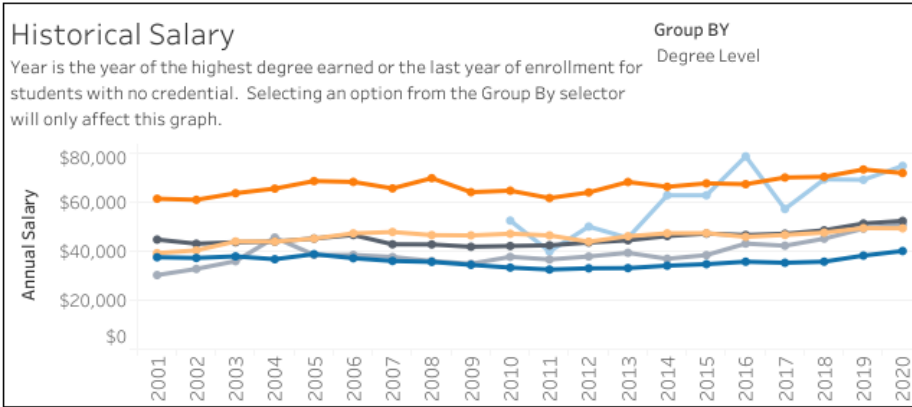
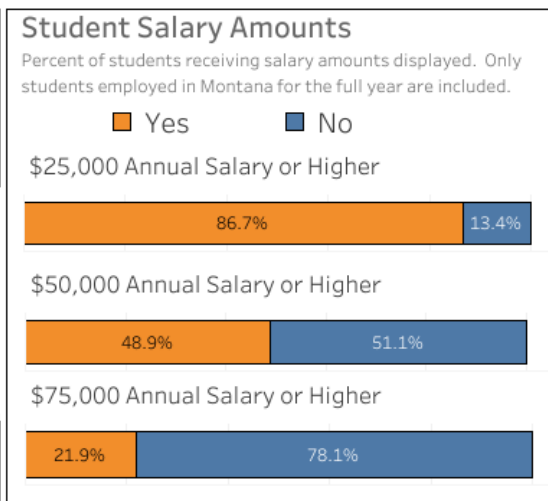
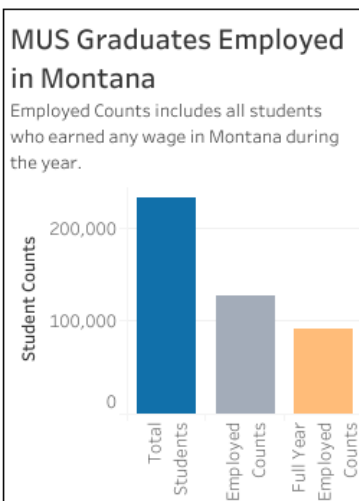
**Total Students**  
231,797

**Average Salary 1 Year**  
\$43,008

**Average Salary 3 Years**  
\$51,674

**Average Salary 5 Years**  
\$55,917

**Average Salary 10 Years**  
\$67,077



## Objective 2.1.3

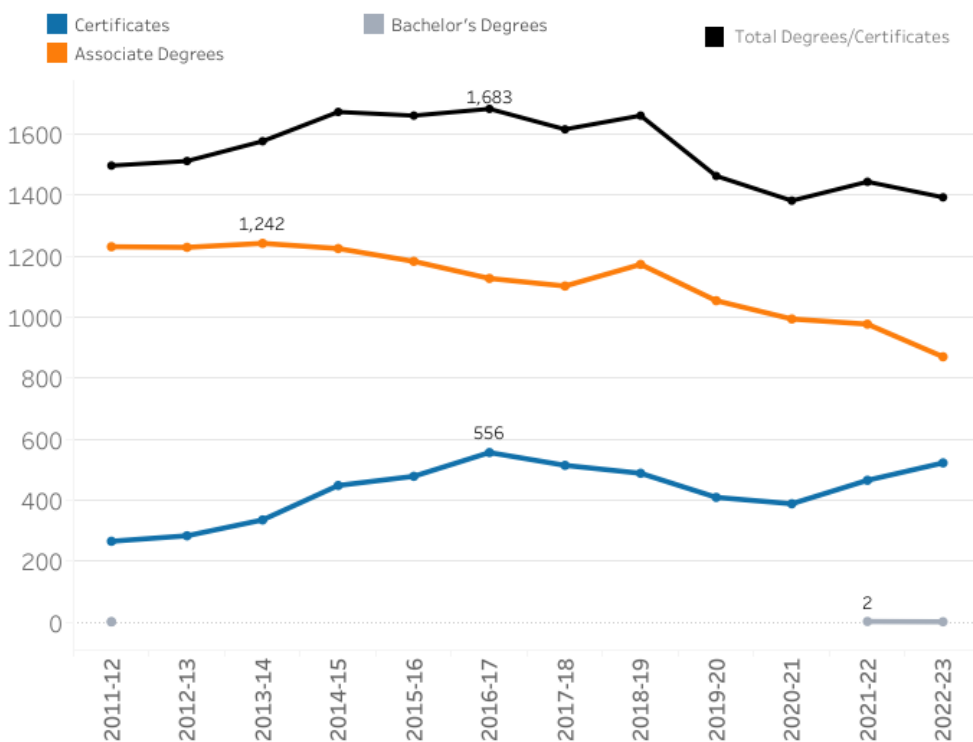
Increase the number of certificates and degrees conferred in 2-year programs

### Metric 2.1.3

Degrees & Certificates Awarded by MUS 2-year Colleges

### MUS Degrees & Certificates Awarded

Academic Year consists of Summer, Fall, and Spring terms (ex: 2018-19 includes Summer 2018, Fall 2018, Spring 2019)  
 Hover the cursor over the graph or year to change the Academic Year metrics. Max values are labeled in the line chart.



Award Type All	
Campus All	
Campus Type 2 Year	
Resident All	
<b>2022-23 Total Degrees</b> <b>1,393</b>	
Graduate Degrees	BA Degrees 1
AA Degrees 870	Certificates 522
<b>Degrees/Certificates By Gender</b>	
50.5%	48.7%
Male	Female
<b>STEM Degrees/Certificates</b> <small>*Includes Healthcare degrees</small>	
36.2%	63.8%
Yes	No

### Count of Degrees/Certificates Awarded

	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Certificates	265	283	335	448	478	556	514	488	409	388	465	522
Associate Degrees	1,231	1,229	1,242	1,225	1,183	1,127	1,102	1,173	1,054	994	977	870
Bachelor's Degrees	1										2	1
<b>Grand Total</b>	<b>1,497</b>	<b>1,512</b>	<b>1,577</b>	<b>1,673</b>	<b>1,661</b>	<b>1,683</b>	<b>1,616</b>	<b>1,661</b>	<b>1,463</b>	<b>1,382</b>	<b>1,444</b>	<b>1,393</b>



## Research & Development

<https://mus.edu/data/strategic-plan/research.html>

### Goal Statement

Establish collaborative programs among institutions, the private sector, and the state to expand research, technology transfer, the commercialization of new technologies, and the development of our entrepreneurs

### Goal 2: Workforce & Economic Development

#### System Initiatives:

##### MUS Research Initiative:

The MUS received an appropriation of \$15M in state funds from the 2015 Montana Legislature to serve as seed money to leverage university-based research into strategic advancements for Montana's economy. The fundamental purpose of this research initiative is to: (1) solve Montana problems with Montana solutions; (2) create good Montana private-sector jobs, and/or; (3) grow emerging and important research sectors that contribute to the diversity of Montana's economy.

The Commissioner of Higher Education administered competitive grants to researchers on the basis of each project's potential for private-sector job creation, commercialization, and economic return on investment for the State of Montana. Areas of emphasis include agriculture, natural resources and energy, materials and manufacturing, health and biomedical sciences, and technology and computer science.

See [details and complete list of funded projects](#)

#### **Objective 2.2.1**

Increase research & development receipts and expenditures

Metric 2.2.1

#### **Objective 2.2.2**

Increase technology licenses with Montana businesses

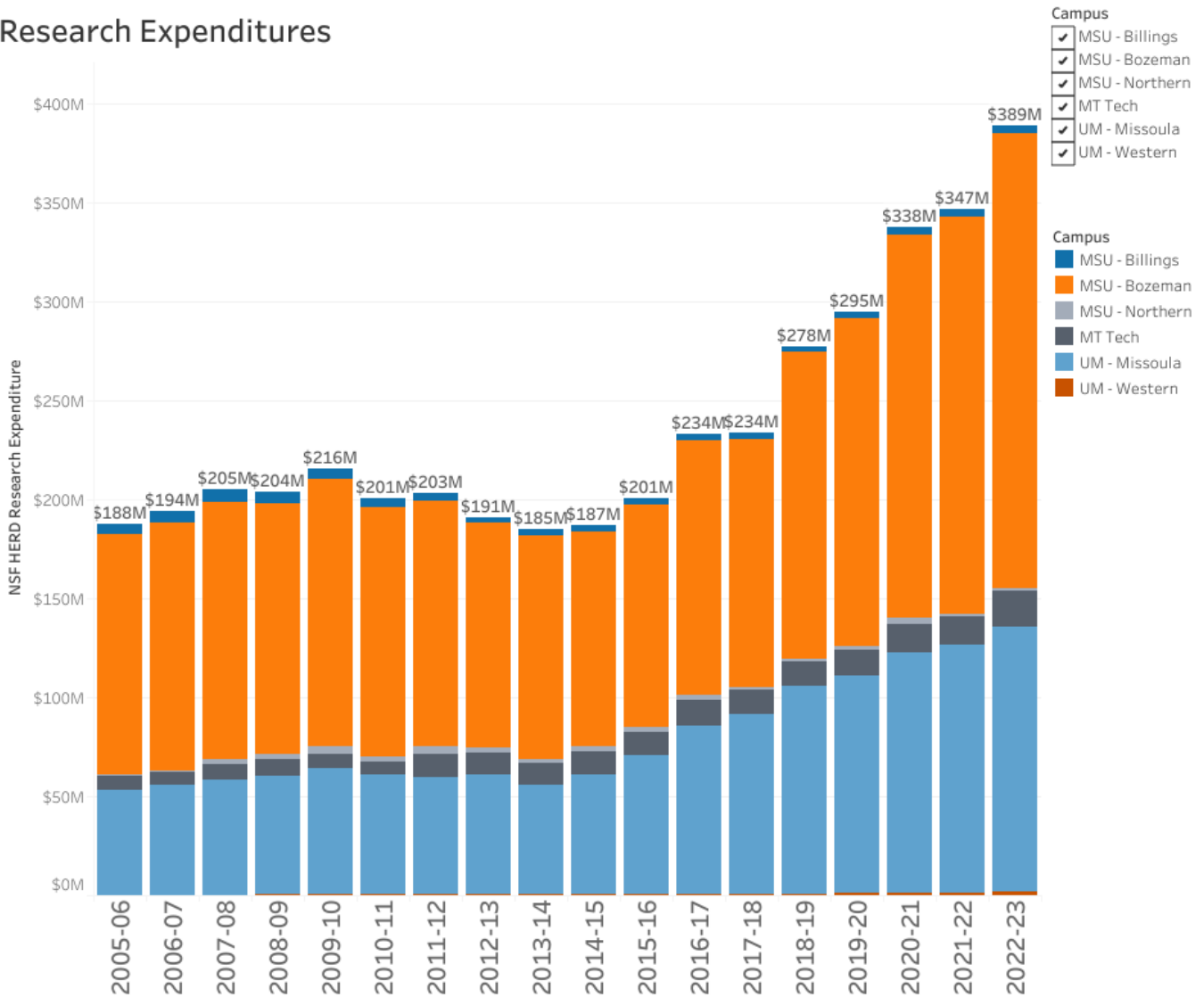
Metric 2.2.2

## Objective 2.2.1

Increase research & development receipts and expenditures

Metric 2.2.1

### Research Expenditures



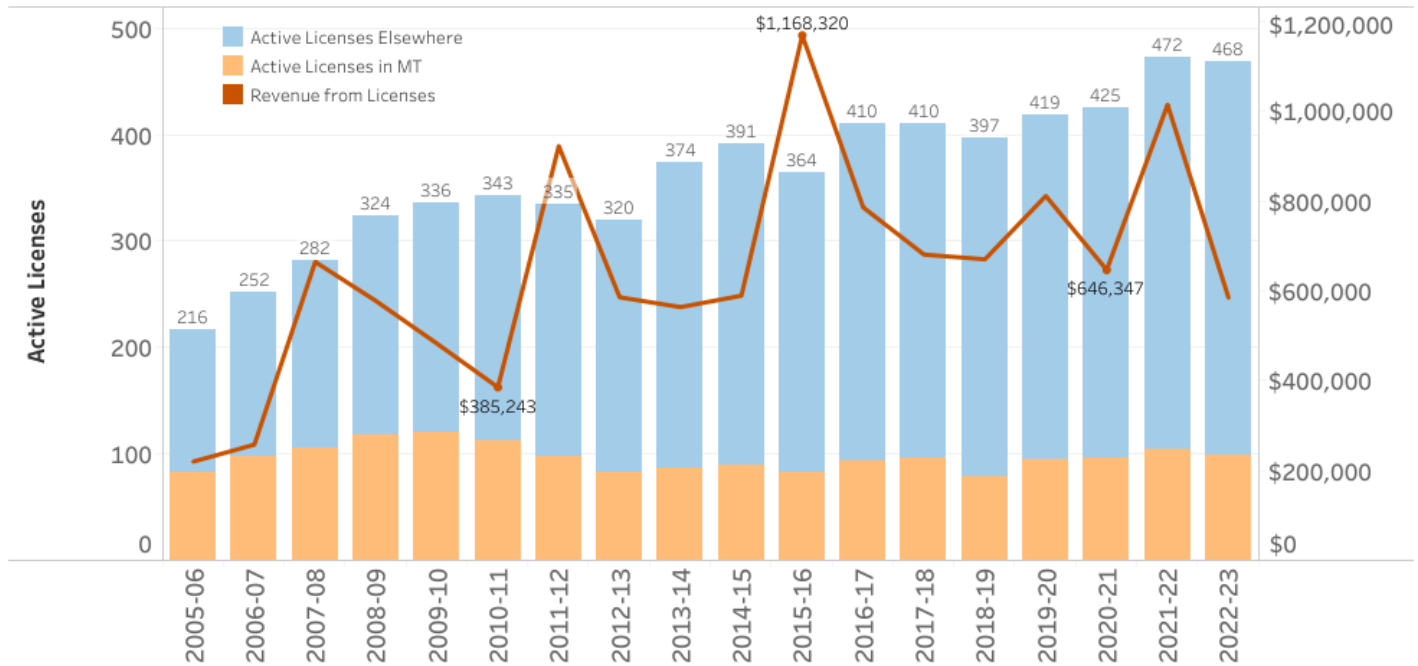
## Objective 2.2.2

Increase technology licenses with Montana businesses

Metric 2.2.2

### MUS Technology Transfer Activity

Campus  
All



	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	20
Patents Issued	26	41	19	27	14	14	8	9	8	7	
Inventions filed	44	36	34	37	37	29	31	29	46	43	
Active Licenses Elsewhere	133	155	176	206	215	231	238	238	287	302	
Active Licenses in MT	83	97	106	118	121	112	97	82	87	89	
Percent Licenses MT companies	75%	75%	77%	71%	49%	43%	37%	38%	37%	31%	
License Revenues	49,949	69,165	221,614	305,893	271,330	215,628	663,586	454,479	315,560	437,782	\$
Revenue from Licenses	\$219,931	\$257,621	\$664,244	\$577,035	\$482,391	\$385,243	\$921,965	\$585,486	\$563,650	\$589,042	\$1,1
Reimbursed Patent Costs	\$169,982	\$138,562	\$442,630	\$271,142	\$211,061	\$169,616	\$258,379	\$131,007	\$250,155	\$151,260	\$5

## Graduate Education

<https://www.mus.edu/data/strategic-plan/graduate-education.html>

### Goal Statement

Expand graduate education capacity and opportunities in order to increase educational attainment of Montanans, fuel economic development, grow the research and development enterprise, and contribute to the cultural and social fabric of Montana and the region.

### Goal 2: Workforce & Economic Development

#### System Initiatives

Faculty, staff, and students in the Montana University System (MUS) are engaged in science and technology research and graduate education that help build Montana's economic future. The MUS research enterprise also builds partnerships with communities, businesses, and other educational entities to help align science education and research with pressing social and economic challenges.

Expanding graduate education capacity and opportunities will help grow the MUS research enterprise. The following initiatives are key to this effort:

- Improved stipends and resident tuition status to attract competitive graduate students;
- Sufficient start-up funding packages and salaries to retain and recruit competitive faculty;
- Strategic addition of graduate programs to meet workforce needs and research opportunities ; and
- Innovative partnerships and financing to build modern facilities and a competitive research infrastructure.

#### Objective 2.3.1

Increase the number and percentage of graduate students in the Montana University System.

[Metric 2.3.1](#)

#### Objective 2.3.2

Increase graduate degree production, maintaining a strong concentration in science, technology, engineering, and math (STEM) fields.

[Metric 2.3.2](#)

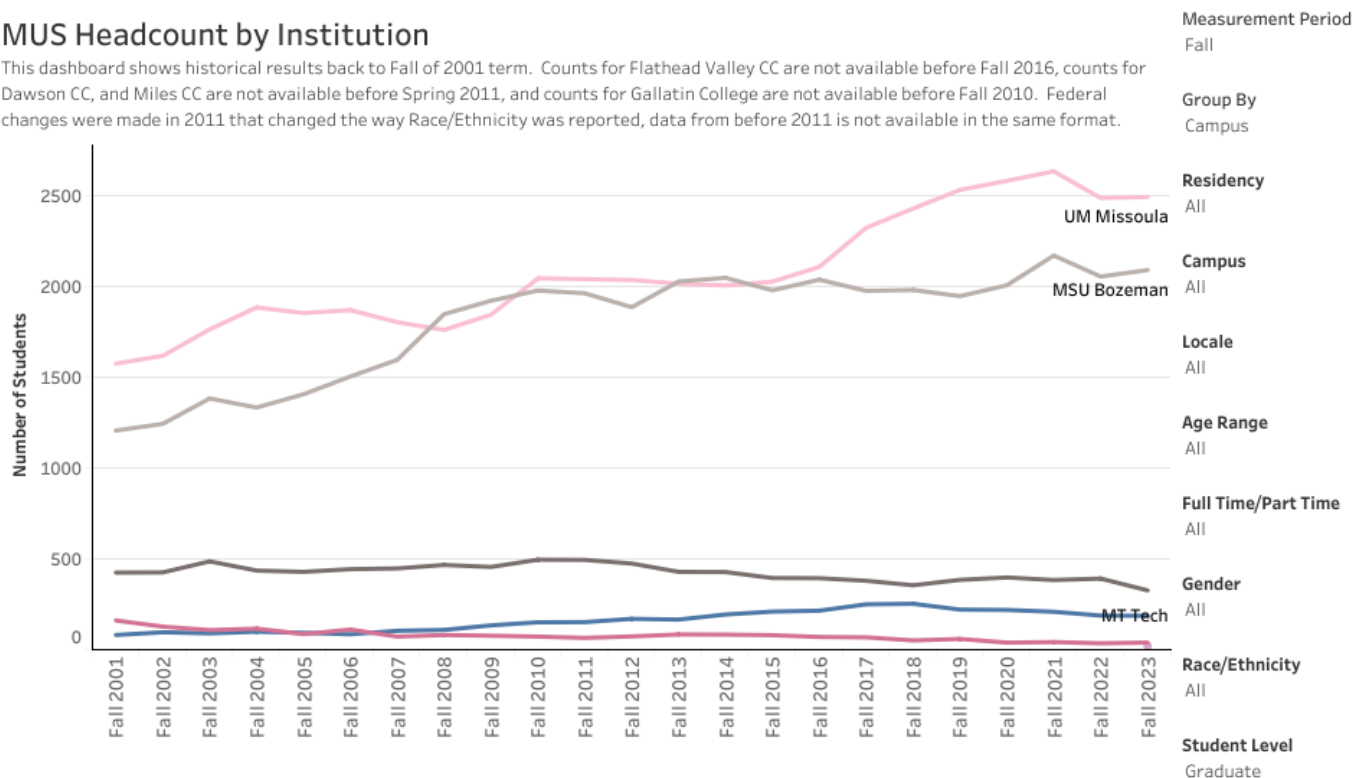
## Objective 2.3.1

Increase the number and percentage of graduate students in the Montana University System.

### Metric 2.3.1

#### MUS Headcount by Institution

This dashboard shows historical results back to Fall of 2001 term. Counts for Flathead Valley CC are not available before Fall 2016, counts for Dawson CC, and Miles CC are not available before Spring 2011, and counts for Gallatin College are not available before Fall 2010. Federal changes were made in 2011 that changed the way Race/Ethnicity was reported, data from before 2011 is not available in the same format.



	012	Fall 2013	Fall 2014	Fall 2015	Fall 2016	Fall 2017	Fall 2018	Fall 2019	Fall 2020	Fall 2021	Fall 2022	Fall 2023
MSU Billings	475	429	428	395	394	380	355	385	398	384	392	327
MSU Bozeman	888	2,030	2,050	1,981	2,040	1,978	1,983	1,949	2,009	2,173	2,057	2,093
MSU Northern	73	84	83	80	70	68	51	59	39	42	35	39
MT Tech	170	166	194	210	215	250	253	221	219	209	188	187
UM Missoula	038	2,018	2,008	2,029	2,110	2,326	2,432	2,535	2,585	2,637	2,490	2,496
UM Western												20
<b>Grand Total</b>	<b>644</b>	<b>4,727</b>	<b>4,763</b>	<b>4,695</b>	<b>4,829</b>	<b>5,002</b>	<b>5,074</b>	<b>5,149</b>	<b>5,250</b>	<b>5,445</b>	<b>5,162</b>	<b>5,162</b>

- Dual Enrollment: All
- Grouping:
  - MSU Billings
  - MSU Bozeman
  - MSU Northern
  - MT Tech
  - UM Missoula
  - UM Western

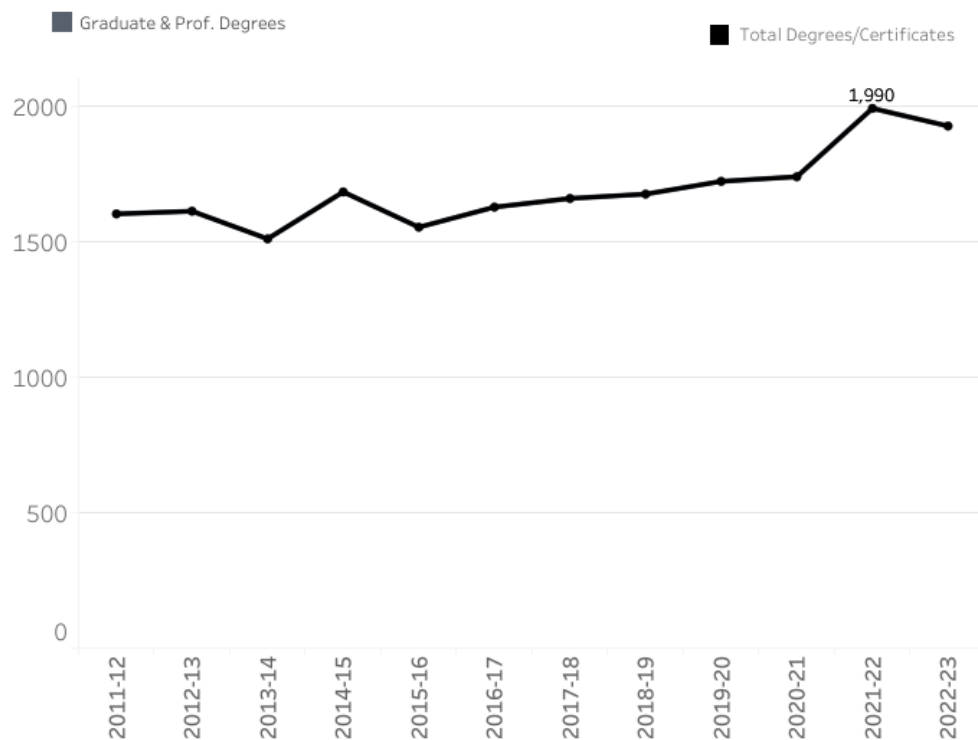
## Objective 2.3.2

Increase graduate degree production, maintaining a strong concentration in science, technology, engineering, and math (STEM) fields.

### Metric 2.3.2

#### MUS Degrees & Certificates Awarded

Academic Year consists of Summer, Fall, and Spring terms (ex: 2018-19 includes Summer 2018, Fall 2018, Spring 2019)  
 Hover the cursor over the graph or year to change the Academic Year metrics. Max values are labeled in the line chart.



**Award Type**  
Graduate & Prof. Degrees

**Campus**  
All

**Campus Type**  
All

**Resident**  
All

---

**2022-23 Total Degrees**

**1,925**

---

Graduate Degrees <b>1,925</b>	BA Degrees
AA Degrees	Certificates

---

**Degrees/Certificates By Gender**

<b>37.5%</b>	<b>62.4%</b>	
<small>Male</small>	<small>Unknown</small>	<small>Female</small>

---

**STEM Degrees/Certificates**  
\*Includes Healthcare degrees

<b>55.4%</b>	<b>44.6%</b>
<small>Yes</small>	<small>No</small>

#### Count of Degrees/Certificates Awarded

	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
<b>Graduate &amp; Prof. Degrees</b>	1,601	1,611	1,509	1,682	1,552	1,626	1,658	1,674	1,721	1,738	1,990	1,925
<b>Grand Total</b>	1,601	1,611	1,509	1,682	1,552	1,626	1,658	1,674	1,721	1,738	1,990	1,925

## Information Technology

<https://www.mus.edu/data/strategic-plan/it.html>

### Goal Statement

Improve the accuracy, consistency and accessibility of system data, including the continued development of a comprehensive data warehouse

#### Goal 3: Efficiency & Effectiveness

### IT Strategic Direction for the Montana University System

Improve the accuracy, consistency and accessibility of system data, including the continued development of a comprehensive data warehouse

To meet the three primary goals outlined in the Board of Regents' Strategic Plan, the Montana University System will strive to implement the following Information Technology Strategic Directions, utilizing cutting-edge technology to provide innovative solutions and enable seamless collaboration, communication, and learning experiences for students, faculty, and staff.

#### 1. Infrastructure and Security:

- Enhance IT infrastructure by investing in modernization, scalability, and reliability to support the growing needs of the Montana University System.
- Implement a comprehensive cybersecurity framework to safeguard critical student, employee, and financial data, protect intellectual property, and ensure compliance with regulatory requirements.
- Continue to develop and improve an education network that provides high speed telecommunication capabilities that link MUS institutions, provide connectivity to national research and education networks, and expand the reach of the MUS to remote areas of Montana.

#### 2. Digital Learning and Teaching:

- Promote the adoption and integration of innovative technologies, learning management systems, and virtual learning platforms to enhance the quality and accessibility of education for students across the state.
- Provide professional development opportunities and support for faculty in effectively utilizing technology tools for teaching and assessment.

#### 3. Research and Innovation:

- Develop a robust research-computing infrastructure, including high-performance computing, data storage, and analytics capabilities, to support advanced research initiatives and interdisciplinary collaborations.

- Foster a culture of innovation by providing resources, support, and partnerships to encourage faculty and students to explore emerging technologies and conduct groundbreaking research.

#### **4. Administrative Efficiency and Services:**

- Streamline administrative processes through the implementation of integrated enterprise resource planning (ERP) systems (i.e. UM and MSU host a single instance of Banner for their affiliated campuses, with the potential for including the community colleges, as well as tribal colleges), learning management systems, and course sharing platforms.
- Centralize administrative services where possible, such as a single source for payroll generation.
- Enhance self-service capabilities for students, faculty, and staff by expanding online portals, mobile applications, and digital communication channels.
- Standardize codes and data elements as well as align business rules and practices across campuses to the furthest extent possible.

#### **5. Data Analytics and Business Intelligence:**

- Establish and maintain a comprehensive data analytics framework including data warehousing to collect, analyze, and interpret data for informed decision-making and performance assessment in measuring the goals of the Board of Regents' Strategic Plan.
- Enable advanced analytics and business intelligence tools to provide actionable insights and visualizations for resource allocation and performance monitoring to include reporting official enrollment, developing linkages with K-12 and workforce data, and producing and monitoring the MUS Operating Budget.
- Develop data governance policies and practices to ensure the security, privacy, and accuracy of student and financial data stored in the data warehouse.

#### **6. Collaboration and Communication:**

- Foster a collaborative and inclusive digital environment by implementing unified communication and collaboration tools, video conferencing solutions, and virtual meeting platforms.
- Encourage interdisciplinary collaboration and knowledge sharing through the development of online communities, research networks, and collaborative spaces.
- Adopt software in support of multi-institutional seamless enrollments, schedules, transcripts and financial aid based on combined enrollment at more than one institution.



## Efficiency

<https://www.mus.edu/data/strategic-plan/efficiency.html>

## Goal Statement

Deliver efficient and coordinated services

### Goal 3: Efficiency & Effectiveness

## System Initiatives: Shared Services

### Goal Statement

Increase the number of services either facilitated, coordinated, or directed in a system-wide fashion that will increase efficiencies, effectiveness and cost savings at individual campuses and system-wide.

### Action Steps

1. **Inventory:** update an inventory of system-wide shared services
2. **Taskforce:** convene a taskforce to help identify potential services to share and sets goals
3. **Focus Areas:** identify and prioritize "areas of focus" to target for shared services implementation

[Metric 3.2.1](#)

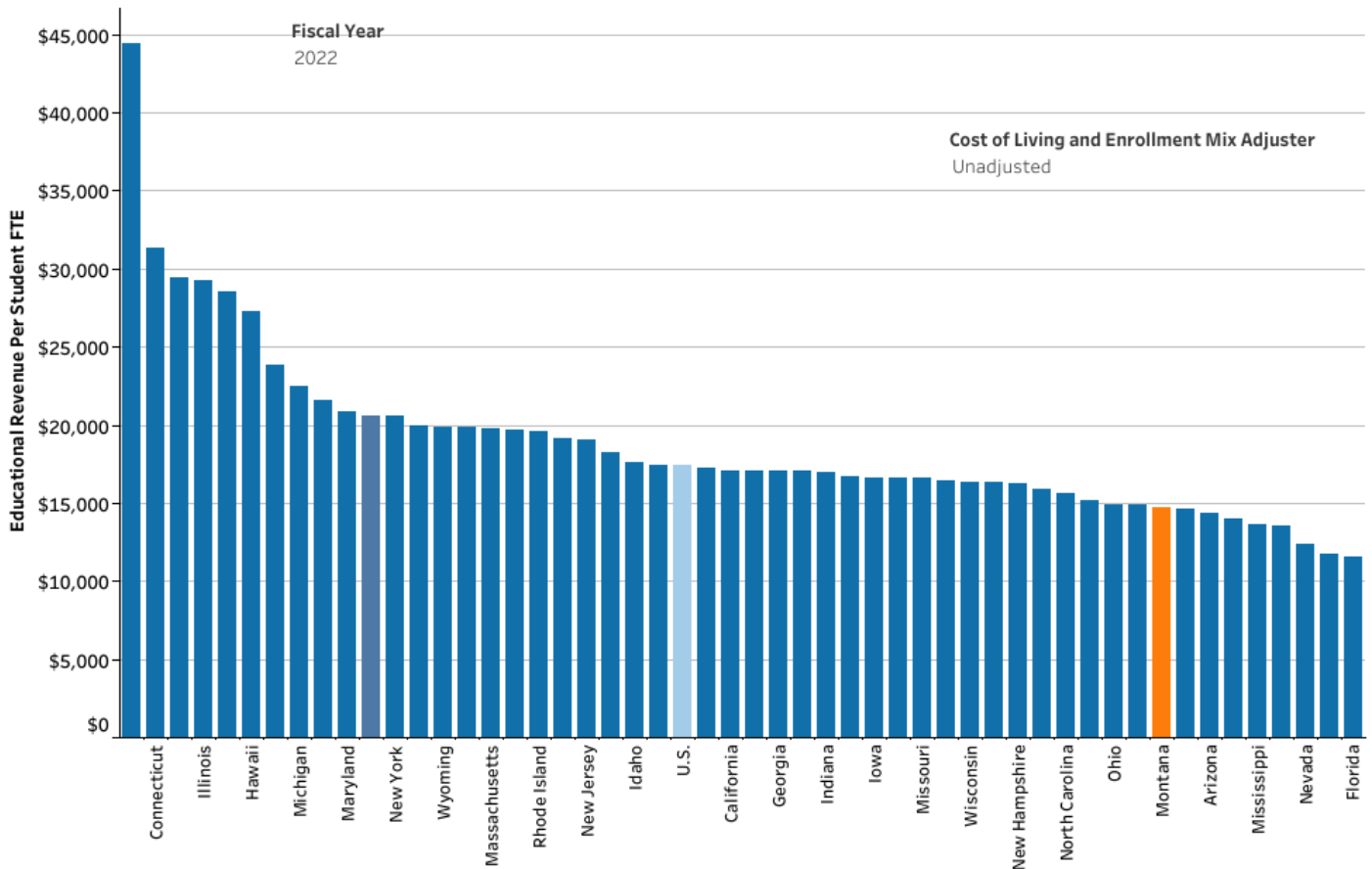
[Metric 3.2.2](#)

## Metric 3.2.1

### Educational Revenue per Student FTE

Educational Revenue is the sum of public higher education state appropriations and public in-state and out of state net tuition. All values in 2021 dollars. Cost of Living and Enrollment Mix adjuster takes into effect the state to state differences in cost of living and enrollment mix (2 year vs 4 year schools).

Source: SHEEO, State Higher Education Finance Report [SHEF FY 2021 \(sheeo.org\)](http://www.sheeo.org)

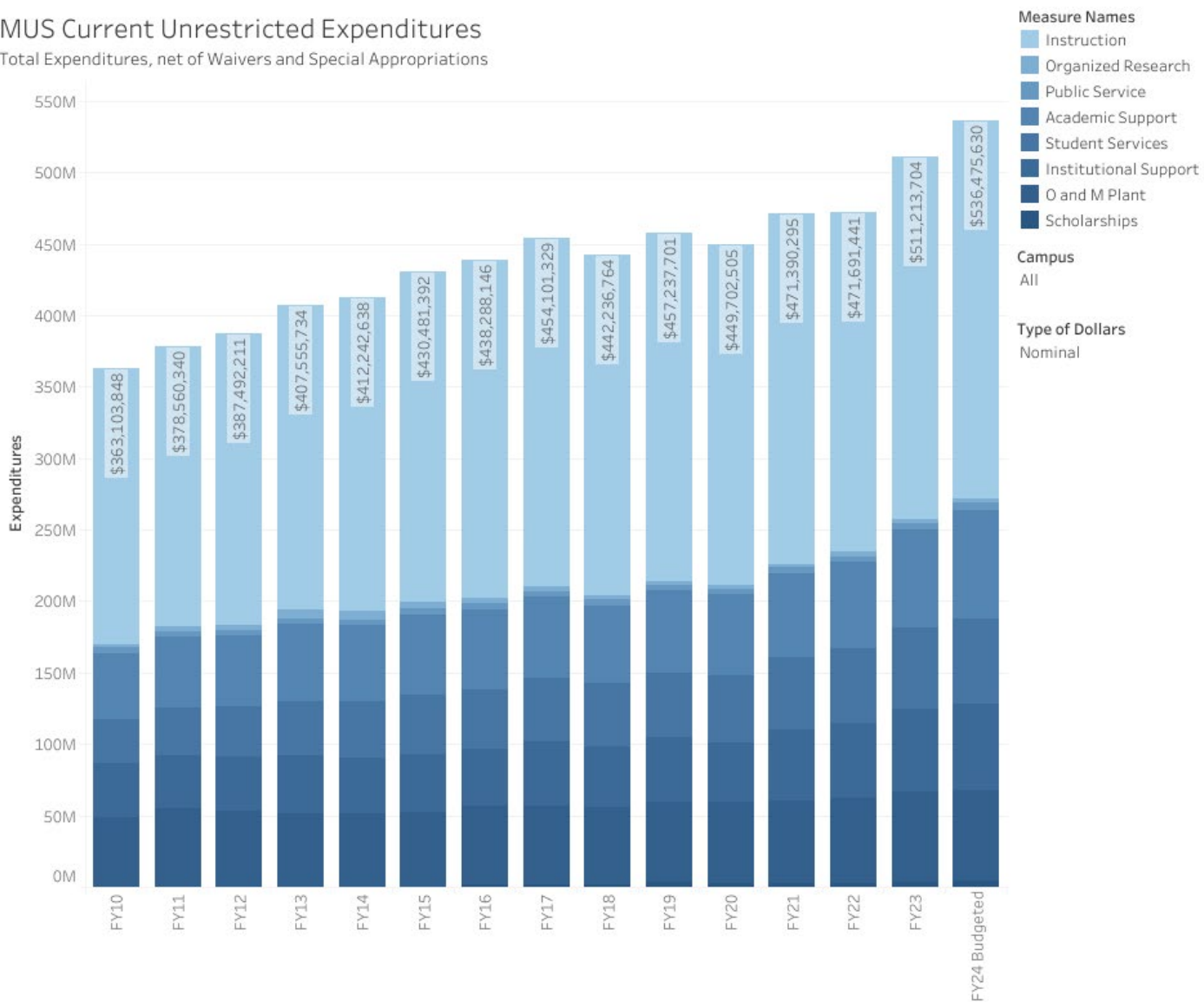


source: SHEEO, State Higher Education Finance Report <http://www.sheeo.org>

## Metric 3.2.2

### MUS Current Unrestricted Expenditures

Total Expenditures, net of Waivers and Special Appropriations



## Transferability

<https://www.mus.edu/data/strategic-plan/transferability.html>

### Goal Statement

Deliver efficient and coordinated services.

#### Goal 3: Efficiency & Effectiveness

##### **System Initiatives: MUS Transferability Initiative:**

The 2007 Legislature appropriated \$1.5 million to help the MUS improve the transferability of courses and further develop its centralized data system.

As a result, the MUS initiated a "**common course numbering**" process for all undergraduate courses. This process requires that all courses deemed to be equivalent must possess the same course prefix, number, and title; all courses with same name and number will directly transfer on a one-to-one basis with equivalent courses at the receiving institution.

##### **Progress:**

As of June 2019, more than 10,000 courses in over 60 disciplines have gone through the Common Course Numbering process and developed program outcomes. This represents 100% of the undergraduate courses in the MUS.

##### **Objective 3.3.1**

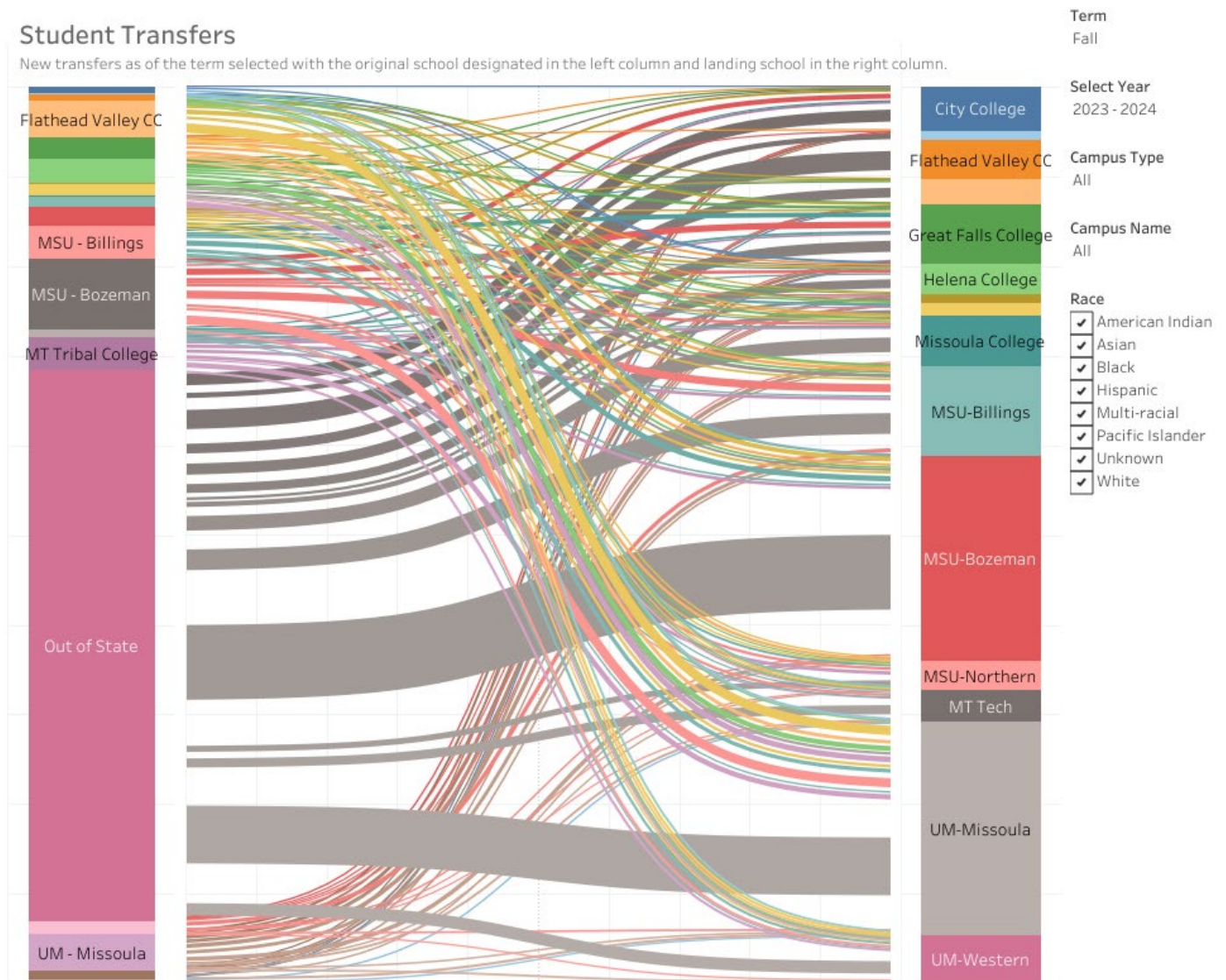
Improve articulation and transferability among all 2-year and 4- year institutions, including community colleges and tribal colleges

[Metric 3.3.1](#)

## Objective 3.3.1

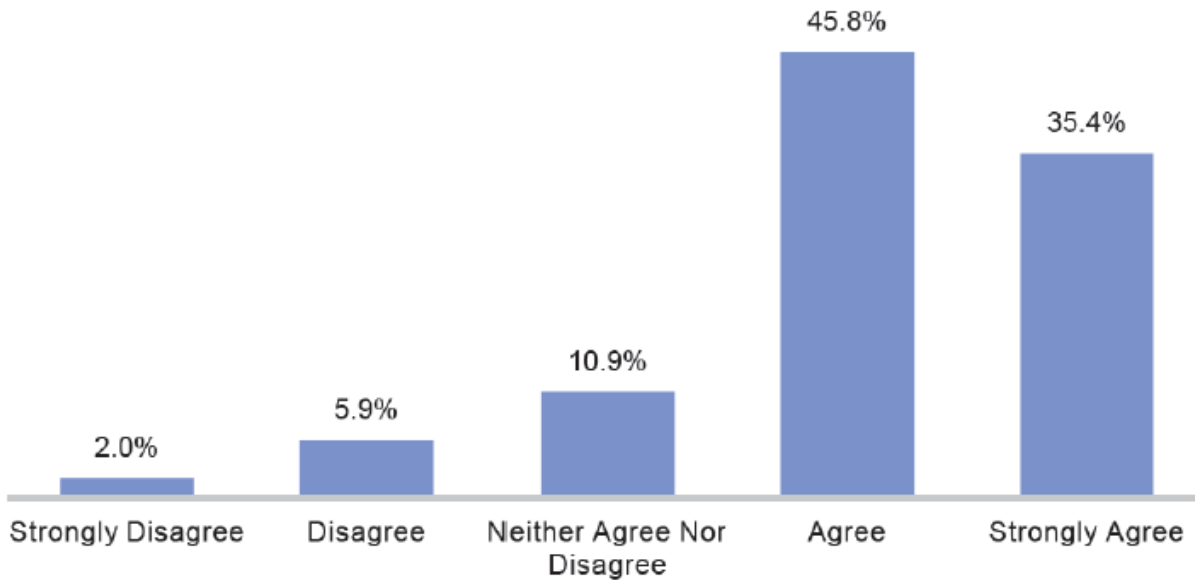
Improve articulation and transferability among all 2-year and 4-year institutions, including community colleges and tribal colleges

### Metric 3.3.1



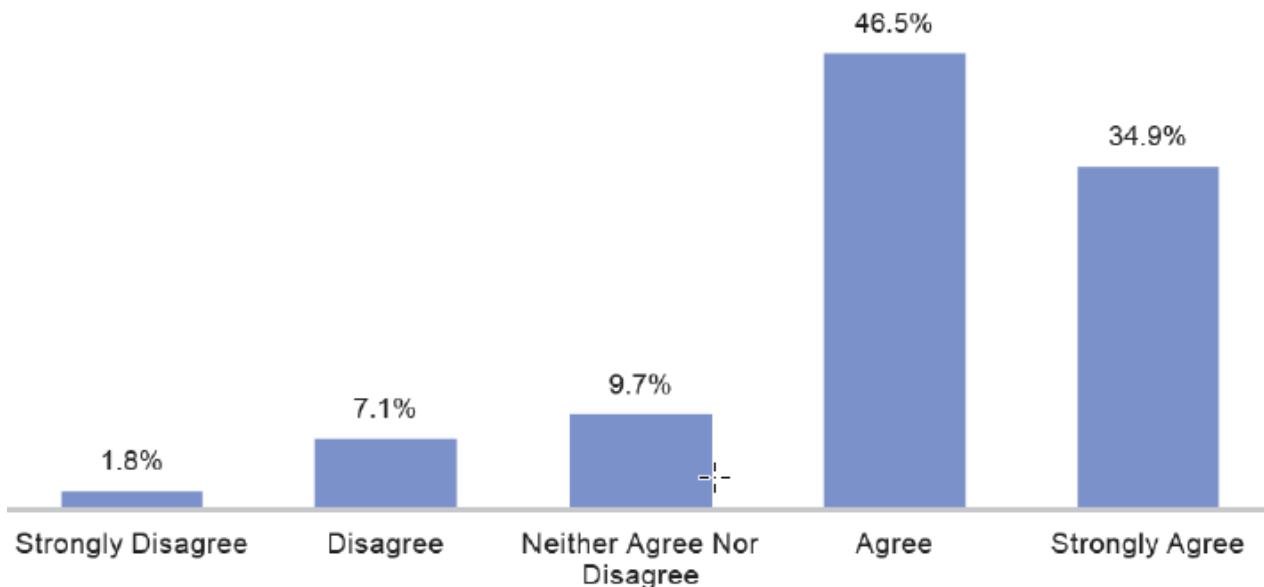
In 2019, the Legislative Audit Division conducted a survey of over 12,000 recent transfer students (response rate = 10.6%).

**Transfer Survey Student Response to: “Overall, I am satisfied with my experience transferring between campuses in the Montana University System.”**



Source: Compiled by the Legislative Audit Division from student transfer survey data.

**Transfer Survey Student Response to: “The transfer process from one Montana campus to another was simple.”**



Source: Compiled by the Legislative Audit Division from student transfer survey data.

## Budget Allocation

<https://mus.edu/data/strategic-plan/budget-allocation.html>

### Goal Statement

Biennial review/update of the budget allocation model consistent with state and system policy goals and objectives

#### Goal 3: Efficiency & Effectiveness

##### Performance Funding History:

In May 2013, the Montana University System (MUS) adopted a performance funding model to augment the university system's allocation methodology for distributing state appropriations to campuses. This first version of the MUS performance funding model allocated \$7.5 million of state dollars in fiscal year 2015, approximately 5% of total state appropriations. The model utilized two basic metrics for all campuses, freshmen to sophomore retention of first-time, full-time students and the annual number of undergraduate degrees and certificates awarded.

Following the approval of the initial performance funding model, a Performance Funding Taskforce comprised of MUS administrators and faculty leaders, designed a more detailed model. The Montana Board of Regents approved the model in May 2014 for allocation of funds in fiscal years 2016, 2017 and beyond.

This current version of the performance funding model was used to allocate \$15 million of state appropriations for FY20, approximately 8% of the total state appropriation to the MUS educational units.

##### Background

The Montana Legislature allocates the vast majority of funding for our education units in a "lump sum" that is then allocated by the Regents to the individual institutions within the system. How these funds are allocated is central to every strategic objective of the Board. In order to achieve the goals and objectives in this strategic plan, the basic funding allocation model must be continually analyzed. To be an effective tool for achieving our strategic goals, the allocation model should, at a minimum:

- Focus on financing for the state system, not only funding for the individual campuses;
- Be transparent as to the policy choices of the Regents, Legislature, and executive branch;
- Provide a framework for dealing with allocations to institutions, tuition revenues, financial aid, and mandatory fee waivers;
- Have a specific fund dedicated to furthering Regents' priorities;
- Protect institutional viability by moderating the short-term effects of enrollment changes;
- Provide incentives for institutions to collaborate as a system;

- Ensure equity of funding among all institutions;
- Maintain an adequate base of funding and education quality for all institutions;
- Maintain a differential between 2-year and 4-year

## **Performance Funding**

In May 2014, the Board the Regents approved a new set of [performance metrics](#) designed to be used in 2015-16 and 2016-17 fiscal years, and beyond. Within this set of metrics, retention rates and completion numbers are measured for all MUS campuses. In addition, mission specific metrics are identified at the flagship and 2-year campuses. Degree counts in graduate programs and research expenditures are included in the flagship campus measurements, while early college enrollment of high school students coupled with a menu consisting of transfer rates, success in developmental education, credit accumulation, and licensure/exam pass rates round out the metrics for 2-year campuses. For all campuses, special weighting will be applied for Pell-eligible students (low income), American Indian students, nontraditional-age students, and veterans.