

School of Outreach Strategic Plan

Fiscal Years 2018-2023

Anneliese Ripley, Dean

8/8/2017



Contents

- Introduction 1
- University of Montana Western 1
 - Mission Statement 1
 - Vision Statement..... 1
 - NWCCU Core Themes 1
 - Montana Western’s Strategic Priorities..... 2
- School of Outreach 3
 - Mission Statement 3
 - Goals 3
 - Organization..... 4
 - Programming 4
 - Staff Management 4
 - Fiscal Management 5
 - Actions and Objectives..... 5
 - SWOT Analysis..... 9
 - Unit Strengths 9
 - Unit Weaknesses..... 10
 - Opportunities 11
 - Threats 12
 - SWOT Summary 12
 - Strategic Baseline Metrics..... 13
 - Montana Youth Challenge Programming 13
 - Early College Programming..... 13
 - Early Childhood Education Programming 14
 - Road Scholar Programming..... 14
 - Summer School Programming 15
 - Fiscal Management of All Designated Funds in Outreach 15
 - Grant-Funded Programming 16
- Appendix A. Governing Policies A-1
 - University of Montana Western Policy A-1
 - Montana Board of Regents Policies..... A-2
 - Policy 303.7 – Online Learning..... A-2

School of Outreach Strategic Plan
FY2018-2023

Policy 304.1 – Continuing Education; Credit Programs	A-5
Policy 304.2 – Continuing Education; Non-credit Programs.....	A-8
Policy 306 – Summer Session; General.....	A-11
Policy 309.1 – Course Credits: Short Courses and Workshops	A-11
Appendix B. Program Sheets.....	B-1
Continuing Education, Extension, and Noncredit	B-1
Extended Studies and Summer School	B-2
Road Scholar	B-3
Sponsored Programs.....	B-4

Introduction

The *School of Outreach Strategic Plan FY2018-2013* provides the historic context for the School of Outreach and serves to guide the unit's efforts over the next five years. This document includes a summary of the University of Montana Western's (Montana Western or UMW) established mission, core themes, and strategic priorities; documents the School of Outreach's mission, goals, programming, and management principles; presents strengths, weaknesses, opportunities, and threats; and provides baseline metrics to assess and prioritize programming efforts.

Montana Western's School of Outreach was established in 1977 within Academic Affairs as the Office of Continuing Education. The unit has operated under different titles over the past 40 years (1977-1993 Office of Continuing Education, 1993-1996 Division of Continuing Education, 1996-2001 Division of Outreach, 2001-present School of Outreach). Outreach programs are authorized under UMW Policy 201.0 and adhere to Board of Regents Policies 303.7, 304.1, 304.2 306, and 309.1 (Appendix A).

University of Montana Western

The School of Outreach acknowledges the primacy of the university's mission, vision, core themes and strategic priorities as stated in *Experience the Difference*¹. They are included in this document as a reminder that this plan serves as a supplement to not a replacement for the university's strategic plan.

Mission Statement

The University of Montana Western differentiates itself and achieves academic excellence by sustaining a culture of concentrated experiential education.

Vision Statement

The University of Montana Western transforms students and its greater community through experiential teaching and civic, environmental, and multicultural engagement. Students learn by engaging in the authentic practices of a discipline under the expert guidance of faculty members. Student success is maximized by providing the means for each student to identify and achieve their educational goals.

NWCCU Core Themes

The following Core Themes were developed to meet the requirements of the Northwest Commission on Colleges and Universities (NWCCU). Most of the goals and objectives found in this plan are closely related to these Core Themes.

1. Continuously improve undergraduate education and experiential learning.
2. Maximize campus-wide support for student success and completion.
3. Foster responsible campus efficiency and stewardship of resources.

¹ Experience the Difference: A Five-Year Strategic Plan (2014-19) for the University of Montana Western.

Montana Western's Strategic Priorities

PRIORITY ONE: Encourage academic excellence and innovation.

PRIORITY TWO: Develop, strengthen and expand creative co-curricular programs and campus collaborations to promote student learning, development, retention and success.

PRIORITY THREE: Develop enrollment management strategies that support the experiential mission and contribute to student success.

PRIORITY FOUR: Employ human resource strategies that support the experiential mission and attract and retain a highly qualified, diverse mix of faculty and staff.

PRIORITY FIVE: Maintain facilities and infrastructure commensurate to the mission and priorities of the university.

PRIORITY SIX: Efficiently steward resources and operations to sustain the university for future generations.

PRIORITY SEVEN: Increase Montana Western's local, regional and national profile.

School of Outreach

The remainder of this document is focused on strategic planning unique to the School of Outreach. As previously indicated, the unit's primary objective is to support the university's strategic planning efforts. This section presents the unique mission, goals, management strategies, programs and objectives that influence the School of Outreach's actions.

Mission Statement

The School of Outreach of the University of Montana Western is committed to providing high quality learning opportunities to citizens of all ages, supporting the University of Montana Western's unique experiential mission, and implementing the MUS's Comprehensive Community College Mission/Vision². We offer alternative and innovative educational experiences at locations on- and off-campus as well as sites linked by technology.

Goals

1. Promote the scenic beauty and cultural history of southwestern Montana (supports UMW Priority Seven).
2. Develop a community of learners, inclusive of all ages, through a variety of programs and services (supports UMW Priorities Two and Three).
3. Utilize technology to (supports UMW Priorities Five through Seven):
 - Deliver courses to a broader audience
 - Track program enrollments
 - Promote technological literacy
4. Contribute to campus financial stability by (supports UMW Priorities Three and Six):
 - Increasing state-supported FTE
 - Providing responsible management of state-supported, grant-funded and self-supporting programs
5. Sustain and enhance the quality of Outreach services through continuous improvement of course offerings (supports UMW Priorities One through Four)
 - Advising/student and participant support
 - Marketing
 - Program diversity
 - Recruitment, training and support of staff

² MUS Comprehensive Community College Mission – The mission of two-year education in Montana is to provide a comprehensive, accessible, responsive, student-centered learning environment that facilitates and supports the achievement of individuals' professional and personal goals, and enhances the development of Montana's citizens, communities and economy. (http://mus.edu/2yr/2yr_Mission_and_Vision.asp)

Organization

The School of Outreach is a formal unit within Academic Affairs.

Programming

The School of Outreach’s offerings are lumped into three programming categories—credit programs, noncredit programs, and sponsored programs.



Each category includes distinct program opportunities. Distinct programs have their own unique mission, goals, objectives and cost principles, which are summarized in program sheets included in Appendix B.

Staff Management

Between six and eight fulltime staff work in the School of Outreach. See figure below.



The unit is directed by a dean who is also responsible for grant-related activities for the campus (proposal preparation, authorization, and review of human subjects’ research). Two fulltime program coordinators support credit-bearing programs, which may be state funded or self-supporting. The two program coordinators also support some community-related non-credit programming. Road Scholar is the largest noncredit program in the School of Outreach. Road Scholar is staffed with a director, a dedicated program coordinator, and temporary staff. An additional grant-funded transformation specialist works in the unit in support of health care programming, which may either be for credit or not for credit.

Fiscal Management

The dean maintains fiduciary responsibility for all School of Outreach charge centers. The unique charge centers (indexes) differentiate among the unit’s state, designated and restricted budgets. The budget categories drive the unique cost principles related to management of state-supported, self-supporting, and sponsored programs. The following table lists active accounts as of June 2017.

Budgets	Name	Index
State Funds	Outreach Admin	DOT041
	Summer School	DSM011
	Extended Studies	DEX011
Designated Funds	Extension/Noncredit	DDESEX
	Road Scholar	DDESEL
	Online Learning	DDESOL
	Distance Learning	DDESDL
	Indirect Costs	DDESIC
Restricted Funds	Perkins	DRPRK2
	STARS/MPDG	DRSPT6
	HealthCare Montana	DREMHC

Actions and Objectives

The following five tables include a listing of major program areas, measureable program objectives, and proposed actions as related to the School of Outreach’s five strategic goals. The proposed actions and measureable objectives are meant to guide ongoing efforts to assess and improve the School of Outreach offerings. Not all Outreach programs closely align with the five goals, thus some programs may not be able to produce measureable results for a given goal. The proposed actions and measureable objectives are not meant to be inclusive of all School of Outreach efforts. The School of Outreach acknowledges that some of the goals, measures, and actions may be modified if the university’s priorities shift between FY18 and FY23. Modifications will be made based on ongoing review of relevant data. The actions and measures presented below will be reviewed annually to determine if the unit is meeting its goals. New actions or measureable objectives may be deemed necessary based on results of the annual review.

School of Outreach Strategic Plan
FY2018-2023

Goal 1. Promote the scenic beauty and cultural history of southwest Montana.

Program	Measurable Program Objectives	Proposed Actions
Extended Studies: Online, ECE, Infant Toddler (IT), Elem. Ed, Early College, etc.	Track program enrollments in Yellowstone (YF) programs. All YF programs are offered in Yellowstone National Park.	Develop credit-bearing partnerships with Yellowstone Forever (YF).
Extension/Non-credit: Prof. Develop., workforce, certification, etc.	Track program enrollments in YF programs. Plan offerings to bring people to Dillon.	Continue Shakespeare in the Parks. Develop extension and non-credit partnerships with YF.
Road Scholar	60-70 programs each year 1,200-1,500 participants each year	Programming in and around the Greater Yellowstone Ecosystem.
Summer School	Track program enrollments in X-Block field-based programs.	Pilot X-Block programming to promote field-based learning in SW Montana.
Sponsored Programs	Partnerships with U.S. Forest Service and BLM to conduct botanical/soil surveys and enhance CCC interpretive signage and programs.	Pursue grant opportunities that support Montana cultural and environmental initiatives.

Goal 2. Develop a community of learners, inclusive of all ages, through a variety of programs and services.

Program	Measurable Objective	Proposed Actions
Extended Studies: Online, ECE, Infant Toddler (IT), Elem Ed, Early College, etc.	Contribute between 20-30% of UMW fall and spring enrollment/FTE. Track special populations and continue annual growth of Early College and Native American enrollments.	Traditional student programming Target disadvantaged populations Focus programming on performance funding metrics
Extension/Non-credit: Prof. Develop., workforce, certification, etc.	Increase community-based youth programming (Safe Sitter and X-Camp). Maintain VESi enrollments.	Adult & youth programming—Safe Sitter, health care, soft skills, teacher certification, etc.
Road Scholar	Maintain 1,200 to 1,500 annual participation numbers in RS programs	Senior programming Intergenerational programming
Summer School	Continue serving current summer school programming goals, enrollments, and audiences.	Traditional student programming Conference/workshop programming Youth camp programming
Sponsored Programs	Current program mix includes: STARS/MPDG, Perkins, Blackfeet Community College, & HealthCare MT	Pursue Perkins funds every year Maintain a variety of additional education program grants.

School of Outreach Strategic Plan
FY2018-2023

Goal 3. Utilize technology to deliver courses to a broader audience, track program enrollments, and promote technological literacy.

Program	Measurable Objective	Proposed Actions
Division Administration	Disaggregate unit enrollments to assess where enrollments are strongest and plan for new program opportunities.	Utilize Banner, UMDW, Moodle and DAWGS to support and track unit successes.
Extended Studies: Online, ECE, Infant Toddler (IT), Elem. Ed., Early College, etc.	Track online retention and persistence rates. Work with eLearning director to increase those rates and student achievement through improved support.	Work with eLearning director to support Moodle LMS Offer courses in technology applications
Extension/Non-credit: Prof. Develop., workforce, certification, etc.	Document VESi, Ed2Go, CCI and HealthEdToday enrollments to establish baseline and track performance.	Work with VESi, Ed2Go, CCI and HealthEdToday to increase certification enrollments.
Road Scholar	Current annual enrollment is around 1,200. Aim for 5-10% annual participation increase.	Utilize Road Scholar's ElStar software to manage program SPIs and track participation
Summer School	Continue to offer 80-90% of summer course offerings online.	Banner, DAWGS, Moodle
Sponsored Programs	Not generally applicable. Program objectives vary with funding source.	Vary by programming objectives.

Goal 4. Contribute to campus financial stability by increasing state-supported FTE and providing responsible management of state-supported, grant-funded and self-supporting programs.

Program	Measurable Objective	Proposed Actions
Division Administration	Achieve annual growth rate between 3 and 5%.	Track program enrollments and expenses Conduct ongoing program analysis
Extended Studies: Online, ECE, Infant Toddler (IT), Elem. Ed., Early College, etc.	Continue to contribute modest FTE gains for all state-funded programs Maintain expenditures per FTE around \$2,100 (\$2,078 in FY16)	Track program enrollments and expenses Conduct ongoing program analysis
Extension/Non-credit: Prof. Develop., workforce, certification, etc.	Increase annual revenue in self-supporting programs. Annual revenue is currently at a low. Increase average cost per enrollment to ~\$150 (\$143.88 in FY16)	Focus programming on high return professional development and workforce training programming.
Road Scholar	Return 1.5% administrative assessment to campus annually (~\$30k).	Monitor program budgets and operating expenses to ensure program profitability.
Summer School	Maintain headcount to FTE ratio above 43%. (46% Sum17).	Manage course offerings and schedules to maximize student enrollments
Sponsored Programs	Annual increases in IDC revenue through growth of grant expenditures (\$93k in FY17)	Track expenses to ensure no unspent grant fund balances. Continue to pursue sponsored/grant programming opportunities.

Goal 5. Sustain and enhance the quality of Outreach services through continuous improvement of course offerings, advising/student and participant support, marketing, program diversity, and recruitment, training and support of staff.

Program	Measurable Objective	Proposed Actions
Division Administration	Maintain a mix of well subscribed and fiscally viable programs. Eliminate poor performing programs.	Annual employee evaluations. Annual program evaluations. Track program metrics for enrollment and performance.
Extended Studies: Online, ECE, Infant Toddler (IT), Elem. Ed., Early College, etc.	Create Enrollment and Marketing Plan for the School of Outreach. Plan should be multifaceted and address issues stated in Goal 5.	Conduct evaluations of all offerings Work with eLearning director to employee best practices online. Work with faculty mentors to provide oversight of EC offerings.
Extension/Non-credit: Prof. Develop., workforce, certification, etc.	Create Enrollment and Marketing Plan for the School of Outreach. Plan should be multifaceted and address issues stated in Goal 5.	Conduct evaluations of all offerings. Use feedback to make continuous improvements.
Road Scholar	Maintain high net promoter scores (NPS). Average NPS should exceed 73%.	Utilize Road Scholar program NPS metrics to monitor participant satisfaction.
Summer School	Create Enrollment and Marketing Plan for the School of Outreach. Plan should be multifaceted and address issues stated in Goal 5.	Utilize Facebook and EC programs to promote offerings off campus
Sponsored Programs	Track program specific performance metrics.	Adhere to grant guidelines and performance metrics.

SWOT Analysis

During the summer of 2017, the School of Outreach conducted an internal analysis of strengths, weaknesses, opportunities, and threats (SWOT). Building from the list that was generated in the 2004 strategic plan, staff members were asked to review the lists, select from or add to the lists, and highlight five items on each list. The selections were not ranked. The following four lists—unit strengths, unit weaknesses, opportunities, and threats—show all of the items that were highlighted by staff. Following each list is a summary of the items marked most frequently by staff.

Unit Strengths

- Access to technology
- Leadership
- All lifelong learners
- Sense of mission
- Entrepreneurial spirit
- New campus facilities
- Open mandate to be responsive to needs
- Beautiful and historic surrounding
- Staff – dedicated, creative, resourceful, skilled, efficient, approachable
- Diversity of programs
- Good communication
- High productivity
- Customer service orientation
- Harmonious work environment/supportive
- Aware of and interested in meeting campus and community needs
- Specific goals and known/achieved
- Mix of new programs and established programs
- Cutting edge ideas/programs/services
- Professional training
- Smooth program operations
- Flexible fee structures
- Partnerships

Staff's Top 5

Staff – dedicated, creative, resourceful, skilled, efficient, approachable
Harmonious work environment/supportive
Customer service orientation
Aware of and interested in meeting campus and community needs
Good communication

Unit Weaknesses

- Identification of target population
- Inefficient database
- Access to technology and hardware
- Lack of funding
- Timeliness
- Long-range planning
- Determine market groups
- Communication between market groups
- Need for training – computer, budgeting, marketing, service, regulations, etc.
- Understanding small campus persona
- Town and gown community relations
- Workspace issues
- Heat/cold
- Small community (limits variety and participant numbers)
- Isolated location
- Name recognition
- Multiple objectives
- Dependence on FTE/Self-support
- Program development resources are lacking
- Few certification programs
- Lack of formalized program evaluations/analysis
- Lack of formalized program needs analysis
- Internal policies limit fee increases
- Lack of a database
- Limited partnerships
- Lack of formal marketing analysis
- Disconnect between unit and campus programming
- Budgeting to keep up with projected increases
- Coordinated marketing campaign
- Top-down campus administration

Staff's Top 5

Marketing strategy that identifies and targets audiences & builds brand recognition

Small community

Name recognition

Need for training

Long-range planning

Opportunities

- Professional development
- Community economic development
- Certification programs
- Online learning
- Partnering with specific entities
- Expand focus or regional reach
- Workforce training
- Advertise in trade publications
- Conferences
- Traveling poster/brochures
- New academic degree programs
- Youth camps
- New program models or delivery methods
- Experience One
- Language programs
- Freshmen interest group programming
- Place-based programming
- Less expensive community/small town atmosphere
- Increasing adult/senior population (state demographics)
- Program branding
- Connect programs to campus

Staff's Top 4

Professional development

Partnering with specific entities

Workforce training

New programming – Certifications, conferences, youth camps, online offerings, & freshmen interest groups

Threats

- Costs are too high
- Enrollment limitations/faculty salary/funding/etc.
- Small population base
- Competition from other groups
- Decreasing youth and high school populations (state demographics)
- Inability to offer competitive salaries
- Lack of community support
- Lack of government/state/community support for higher education
- State and national economy
- Political climate
- Fragile campus cohesion (faculty/staff/admin)
- Enrollment
- Lack of shared campus vision
- MUS policies and funding
- Own creativity/self-limiting
- Pressure for FTE generation
- Poor/inefficient marketing
- Complacency
- Campus objectives overriding unit programs
- Course(s) required/needed, but aren't offered
- Administrative red tape or inefficiencies

Staff's Top 5

Enrollment

Small population base

Competition from other groups

External market forces (economy and politics)

Internal constraints and priorities (complacency, lack of shared vision, competing internal demands)

SWOT Summary

Several findings emerge from the School of Outreach's SWOT analysis. The unit prides itself on creativity, resourcefulness, harmony, customer service, and open communication. There is a high level of commitment to meeting campus and community needs. The unit is challenged to serve the widely differing needs of a small, rural community, build a recognized brand for disparate programs, and to address rapidly changing staff training needs (mostly in technology/computer software). Staff members recognize continuing opportunities to develop new partnerships, programs and training, especially workforce training, certificate programs and youth programs. Threats to new programming and growth include the challenge of serving small populations, competition with other groups and campuses, costs, and stagnation.

Strategic Baseline Metrics

The following tables show longitudinal trends in School of Outreach programs. The trends document changes in enrollment, FTE, revenue, and programming. The narrative that follows each chart provides a brief explanation for the changes. These data and explanations serve to guide strategic efforts to assess and advance the School of Outreach.

Montana Youth Challenge Programming

Academic Year	No. of Courses Offered	Credits Generated	Cumulative State FTE
2015	3	44	5.8
2016	6	70	14.0
2017	9	93	17.4
Data source: Banner reports (WJRENRL 201450 to 201750)			

In Spring 2015 MYC programming shifted from self-support to state-support. This was done to contribute to state-based FTE tied to performance funding metrics. The recorded gain from FY15 to FY16 is the result of one semester of programming in FY15 versus two semesters of programming in FY16. Credit and FTE generation increase from FY16 to FY17 as a result of programming efforts. The School of Outreach began offering up to 15-credits of coursework to MYC cadets in FY17. Enrollment in the optional credit-bearing opportunities was limited in the first year (just 4) but will likely increase over time. The number of courses offered will likely not increase.

Early College Programming (moved from self-support to state-support in FY15)

Academic Year	Unduplicated Headcount	Credits Generated	FTE
2015	16	85	5.66
2016	59	356	23.72
2017	78	490	32.65
Data source: Registrar			

Like MYC programming, the School of Outreach shifted other early college programming efforts from self-support to state-support in FY15. This was done to contribute to state-based FTE tied to performance funding metrics. Growth in these metrics from FY15 to FY 17 is the result of continued efforts to expand the number of concurrent credit offerings at Beaverhead County High School and develop new MOU partnerships with other schools. Within the past three years, UMW has expanded concurrent credit opportunities to Great Falls, Hamilton and Butte. Most out-of-region partnerships are related to early childhood programming.

Early Childhood Education Programming

Academic Year	No. of ECE Courses	Enrollments	FTE
2015	72	692	95.26
2016	75	700	118.84
2017	79	811	178.08
Data source: Banner reports (WJRENRL 201450 to 201730)			

In 2016, UMW was approved to offer a BS degree in pK-3 education. The BS degree stacked onto UMW's AAS in early childhood. At the same time, the state received a grant that provided scholarships to students pursuing degrees in pK-3 education. As a result, enrollments in UMW's ECE coursework increased. The increase in ECE enrollments represented above does not reflect the full enrollment impact of the new degree and scholarships. It is expected that enrollments core ECE offerings will remain strong, but there will likely be a natural enrollment decline as the grant scholarship funds are no longer available.

Road Scholar Programming

Fiscal Year	Revenue (\$)	Expense (\$)	Program Start Dates	No. Participants	Net Promoter Score (NPS)
2013	892,965	880,616	-	-	-
2014	989,015	1,051,313	-	1142	77.81
2015	1,461,581	1,360,727	82	1229	78.52
2016	1,629,861	1,654,462	84	1028	77.94
2017*	1,967,944	1,988,868	-	-	-
*As of 07/24/2017, Data source: UMDW			Based on Road Scholar fiscal year.		

Montana Western has been a Road Scholar (formerly Elderhostel) program sponsor since 1978. During the past five years, program revenue and expenses have more than doubled. The growth in revenue and expenses is related to increases in programming, enrollments, and higher amenity services. The enrollment and net promoter score data presented above has been provided by Road Scholar and some data points are missing. Program staff will track this information in the future to allow for more timely analysis of trends. Note there is a misalignment in fiscal years. Montana Western's fiscal year runs from July to June; Road Scholar's fiscal year runs from January to December. Road Scholar continues to request more program start dates. School of Outreach goals for Road Scholar include responding to demands for more programs as appropriate, achieving gains in net promoter scores (NPS), contributing administrative fees to the campus, and operating with a positive net balance.

Summer School Programming

Summer	Headcount	FTE	Headcount to FTE Ratio
2013	248	106.47	43%
2014	270	116.60	43%
2015	236	100.73	43%
2016	296	121.73	41%
2017	334	154.06	46%

*As of 5/22/17, Data source: 10-Year Headcount and FTE Report

The headcount to FTE ratio in summer school was flat (43%) from Sum13 to Sum15. Even though headcount increased in Sum16, the headcount to FTE ratio decreased—meaning students enrolled in fewer credits. Summer programming was revised for Sum17. The schedule was modified to include one 10-week session and one 18-day block. Prior sessions included one 14-week session, three 18-day blocks and two 2-block stringers. The simplified schedule in Sum17 appears to have had the intended effect of increasing enrollment and credit loads—the headcount to FTE ratio increased to 46%.

Fiscal Management of All Designated Funds in Outreach

Fiscal Year	Projected			Actual*		
	Revenue	Expense	Difference	Revenue	Expense	Difference
2015	\$ 1,229,000	\$ 1,225,750	\$ 3,250	\$ 1,750,130	\$ 1,620,211	\$ 129,919
2016	\$ 1,865,000	\$ 1,757,354	\$ 107,646	\$ 1,877,358	\$ 1,877,731	\$ (373)
2017	\$ 1,931,300	\$ 1,898,350	\$ 32,950	\$ 2,342,797	\$ 2,236,857	\$ 105,940
2018	\$ 2,290,000	\$ 2,226,300	\$ 63,700	\$ -	\$ -	\$ -
Average	\$ 1,828,825	\$ 1,776,939	\$ 51,887	\$ 1,990,095	\$ 1,911,600	\$ 78,495

*As of 07/24/17, Data source: UMDW for DDESOL, DDESOL, DDESEL, DDESEX & DDESIC

Every spring designated budget projections are made for the upcoming fiscal year—past and current projections are summarized above. Actuals are also included in the table above. Over the past three fiscal years, revenue and expenses have increased more than 30%. The average cumulative difference between revenue and expense was \$89,186 for designated budgets managed by the School of Outreach. Although the difference between revenue and expense remains positive, expenses in some programs threaten to overtake revenue. Expenses need to be carefully tracked in all designated accounts, especially DDESEX and DDESEL.

Grant-Funded Programming

Perkins Local Application

Project Year	Program Focus	Grant Award	Expenditures
2015	Early College and Farrier Science	\$ 61,111	\$ 32,407
2016	Early College and ECE	\$ 28,351	\$ 28,229
2017	Early College, ECE and Infant Toddler Training	\$ 35,000	\$ 35,000*
2018	Early College and Glassmaking	\$ 30,908	NA
*Projected			

Perkin’s Local Application funding is awarded based on credits generated from CIP-coded courses. The Classification of Instructional Programs (CIP) is a standardized taxonomic scheme used to track, assess, and report on fields of study. Perkins tracks CIP codes to determine if a program qualifies as two-year, career technical education (CTE). Perkins also funds secondary to postsecondary transition programming (early college credits). The Office of the Commissioner of Higher Education (OCHE) determines the allocations based on campus numbers, system numbers, and available federal funds. UMW has few CTE programs, but largely qualifies based on ECE enrollments. The new glassmaking program should contribute to two-year enrollment numbers. It is difficult to establish a numeric goal for Perkins’s funding; however, it should remain a goal to maintain some level of funding support CTE and early college programming efforts.

STARS/MPDG

Program Year	Grant Award	Expenditures	Unspent Funds (\$)
2012	--	\$ 56,689	--
2013	\$ 195,579	\$ 130,456	\$ 65,123
2014	\$ 202,662	\$ 134,334	\$ 68,328
2015	\$ 363,905	\$ 148,054	\$ 215,851
2016	\$ 363,905	\$ 321,441	\$ 42,464
2017	\$ 291,190	\$ 211,725*	\$ 79,465*
Data source: UMDW		*As of 6/28/17	

The School of Outreach manages this grant and its employees for the Department of Public Health and Human Services. It is a partnership that benefits the UMW with IDCs and provides assistance to the DPHHS. Programming efforts have increased since the partnership began and are expected to continue to grow. This program supports the unit’s goal to build partnerships and contribute to the fiscal stability of the campus through grant-funded programs.

HealthCare MT

Program Year	Grant Award	Expenditures (\$)
2014		
2015	\$ 145,132	\$ 84
2016	--	\$ 21,339
2017*	--	\$ 82,248
Data source: UMDW		*As of 6/30/17 \$41,461 remaining

The Healthcare Montana grant is scheduled to end March 2018. UMW will use the remaining grant funds (\$41,461) during the fall to fund supplemental health sciences coursework and continue the workforce and professional development work of the transformation specialist, Beth Warton.

Indirect Cost Recovery

Fiscal Year	Grant Expenditures	IDC Revenue (\$)
2012	\$ 489,554	\$ 55,203
2013	\$ 577,623	\$ 74,737
2014	\$ 597,948	\$ 54,958
2015	\$ 621,723	\$ 44,048
2016	\$ 653,515	\$ 54,525
2017	NA	\$ 93,741*
Data source: SEFA Reports & UMDW		*As of 7/06/17

Most of UMW’s federally funded grants support educational programming and have a limited indirect cost (IDC) rate. UMW’s federally negotiated IDC rate is 34% of modified direct costs; however, education programs typically limit IDCs to 8% of total direct costs. Most of UMWs IDC revenue is based on an IDC rate of 8% of total grant revenue. FY17 represents a high revenue year for the IDC account because grant expenditures were high and the campus administration assessed a 1.5% administrative fee on Road Scholar revenues. A goal for coming years is to continue to grow grant expenditures—essentially ensure awarded grants funds are fully spent.

Appendix A. Governing Policies

University of Montana Western Policy

201.1 Outreach Program

Date Adopted: 6/1/1993

Date Revised: 2/10/2005

References: BOR 304.1, 304.2, 306, 309.1

Issuing Office: Academic Affairs

Approved By: Karl Ulrich

Policy

The University of Montana Western, through its School of Outreach, provides continuing education programs consisting of night and weekend classes, summer school, online classes, and extension classes in various communities throughout Montana.

Purpose

The outreach program provides lifelong educational opportunities to a wide variety of interested learners on and off campus.

Procedures

Procedures governing outreach programs are available from the School of Outreach. The rules that govern continuing education offerings shall be consistent with BOR policies for credit and non-credit programs (304.1 and 304.2 respectively).

Authority

BOR 304.1, 304.2 306, 309.1

Responsibility

Dean of Outreach & Research, Provost/Vice Chancellor for Academic Affairs

Montana Board of Regents Policies

Policy 303.7 – Online Learning

Effective: Adopted: November 4, 1988; Revised: September 22, 2011

I. Board Policy

A. The commissioner of higher education shall appoint a member of the staff to be the director of eLearning business and to chair an eLearning advisory committee (EAC). The EAC is comprised of Montana university system (MUS) eLearning leaders who collaborate to benefit learners and to align campus eLearning efforts. The EAC is composed of one primary representative from each stand-alone campus in the MUS and from each of the community colleges. EAC campus representatives are appointed by the respective campus chief academic officer. The purpose of the EAC will be to advise the academic, research, and student affairs (ARSA) committee of the board through the eLearning director on matters related to present and future delivery of online education and other matters related to the use and types of educational technologies associated with quality online education.

B. The most recent update to the accreditation standards of the Northwest Commission on Colleges and Universities (NWCCU), the regional accrediting body for the Montana university system and the community college campuses in Montana, has embedded the language, “wherever offered and however delivered” heavily into its standards for accreditation specifically to eliminate separate standards associated with online learning. As a matter of practice, the EAC accepts and endorses a similar approach to board of regents (BOR) policies and practices governing both traditional face-to-face delivery and the use of technology in delivering postsecondary education.

C. Definitions

1. Distance Education is defined as planned learning that normally occurs in a different place from teaching, requiring specialized course design, instructional techniques, communication through various technologies, and special organizational and administrative arrangements. Both synchronous and asynchronous learning are included in this definition.
2. Face-to-Face/Enhanced delivery is characterized when instruction occurs in a traditional classroom with face-to-face interaction between the instructor and students, at any local campus or remote site, and includes utilization of technology to enhance the class without reducing student seat-time.
3. Internet or Online delivery implies that 100% of the course section is offered completely online and delivered asynchronously, with no face-to-face interaction between instructors and students.
4. Video Conferencing is characterized by a course section offered through scheduled (synchronous) interactive video, including desktop conferencing.
5. Blended learning is designed specifically to be delivered partially online in an asynchronous format and partially through face-to-face (F2F) interaction, typically in the classroom. Both online and F2F interactions are required for the course. This delivery is characterized by the expectation of reduced F2F class meeting time when compared to the equivalent credit classroom course.

6. Other Distance Learning includes courses other than internet/online and interactive video, and may include correspondence courses, tape/DVD delivery, etc.

II. Reporting Procedures

A. The director of eLearning business will annually identify data elements involving online learning to be gathered on an annual basis, and will rely upon the use of these definitions in the gathering of data from the campuses and the MUS data warehouse. By September 15th of each year, the director shall file with the ARSA committee of the board, an annual report of online learning activity over the preceding fiscal year. The director will provide guidelines to the campuses for the format and content of this annual report, the web site presence of online programs will be updated at least annually, and the director will publish a compiled report on the MUS web site at <http://mus.edu/online>.

B. The EAC serves as a formal conduit for campuses and OCHE to share technology interests, adaptations, uses, experiences for the purposes of judging and evaluating compatibility and possible multi-campus purchasing/licensing efficiencies that can be discussed and attained where feasible, as well as to offer periodic recommendations to the ARSA committee of the board, as needed. Campuses considering the acquisition of large-scale interactive delivery systems and/or learning management systems to support technology-mediated learning or online course development and delivery should strive to select systems that are compatible with existing technology, and should provide timely notice of interest, product experience/evaluations, and potential acquisition to the to the director of eLearning business for review and discussion with the EAC prior to purchase and implementation. Prior to purchases of other related distance learning technology, campuses are encouraged to share their desire for such technologies with the EAC.

III. Standards and Conditions

A. Faculty training and development of courses or programs will follow the eight core principles of quality online course design as developed, adopted, and defined by the EAC, and which may be found at: <http://mus.edu/online/CorePrinciples0308.asp>.

B. Each campus will ensure that students admitted to a course possess the knowledge and equipment necessary to use the technology employed in the course, and will provide aid to students who experience difficulty using the required technology.

C. Each campus will be responsible for ensuring that its online web presence at the Montana university system web site is current and fully functional with respect to the posted web links, and will notify the director of eLearning business whenever updates are needed or web links are not functioning properly.

D. Course-related content

1. Copyright and intellectual property protection (see also BOR Policy 401.3)

- a. Campuses offering distance education courses shall ensure compliance with all applicable copyright laws governing the use and transmission of films, videotapes, recordings, performances and other protected works, as well as the reproduction of printed materials prior to the offering or transmission of the course.

School of Outreach Strategic Plan
FY2018-2023

b. Campuses offering distance education courses shall ensure compliance with all laws, as well as MUS or institutional policies relating to the protection of intellectual property prior to the offering or transmission of the course. History: Item 60-004-R0788, Telecommunication Instruction Policy, November 4, 1988; as revised March 25, 1999. Item 152-132-R0911, revised September 22, 2011.

Policy 304.1 – Continuing Education; Credit Programs

Effective: November 18, 1999; Issued: December 10, 1999

I. Board policy:

A. There shall be no distinction between extension and resident credit.

B. Continuing education credit courses shall meet the following criteria:

1. Faculty. Persons assigned to teach courses must have credentials equivalent to those required of faculty teaching the same or similar courses under regular instruction.
2. Facilities. Library or laboratory facilities must have been assessed and determined to be equivalent to those required for the same or similar courses offered under the regular instruction credit programs.
3. Educational resources. The appropriate educational resources have been assessed and determined to be equivalent to those required for the same or similar courses offered under regular instruction credit programs.
4. Eligibility of students. Students must meet the same admission and grade point standards and other academic requirements that are met by students taking the same or similar courses under regular instruction.

C. Direct costs for credit continuing education programs shall be self-supporting through collected fees or designated funds.

D. Indirect costs of credit continuing education programs shall be funded from collected fees or designated funds or in part through the current unrestricted operating funds of the unit.

E. Enrollment in continuing education credit programs shall not be counted and reported as part of each unit's regular enrollment, but shall be reported to the commissioner of higher education under guidelines to be established by the commissioner.

F. Units of the Montana university system (MUS) shall maintain their present activities in continuing education and strengthen the cooperative effort among the six campuses, the colleges of technology, the community colleges and the private colleges.

G. Credit offerings for continuing education and extension courses must fall within the mission approved by the board of regents for each campus of the MUS.

H. Each campus shall establish procedures for the academic approval of continuing education credit offerings.

I. If a course is proposed to be offered in a community, the institution located closest to the community shall be notified so that it can respond to the course proposal assuming the course falls under the mission of the closest institution. If the institution is unable or unwilling to respond to the course proposed, the proposing institution may offer the course. The adjunct professors shall be supervised by the unit offering the course. The university units may include the private colleges, community colleges and colleges of technology in the administration of this policy.

J. No institution shall withhold approval unless it actually plans to offer an essentially equivalent course in the same semester and in a location reasonably accessible to the same clientele.

K. In determining whether another institution offers a course, the criterion shall be the general coverage of a field as described in the current catalog, rather than precise equivalence of course names.

L. Where possible, plans should be made to deliver structured educational programs rather than individual courses.

M. In courses in which veterans who are eligible for fee waivers are enrolled, the minimum class size may be increased by the number of such veterans.

II. Administrative procedures:

A. When any campus of the MUS receives a request for a course, workshop, program, etc., which is not within the assigned mission of that campus, the following procedures should be used. The continuing education department receiving the request should:

1. Inform the person making the request that someone from the MUS will contact them in the near future.
2. Contact the institution with the appropriate mission, which shall assume full responsibility for further follow-up of the request.

B. The continuing education department with the appropriate mission shall respond to the request for the continuing education activity by:

1. Determining the feasibility and/or appropriateness of the requested proposal.
2. Determining the method of delivery.

C. Contact with the person making the request may be necessary to obtain the information needed about the program. Regardless of the circumstances the person making the request should be contacted as soon as possible but no later than one week.

D. Activities which are multidisciplinary may be offered by an institution if the primary emphasis of the activity falls within the institution's role and scope. For example, The University of Montana could offer a workshop on "The Law and Nursing" provided the emphasis of the workshop is on law and not upon the practice of nursing.

1. An institution planning multidisciplinary activities should inform the other institutions with component programs. Joint sponsorship may be an advantage.
2. Approval by the other institution is not required provided the primary emphasis of the activity falls within the sponsoring institution's mission.

III. Options for Delivery.

A. The institution with the mission designation determines one of the four delivery systems as follows:

1. The mission institution delivers the complete program.

2. There is equal division of responsibilities and equal division of finances by co-sponsoring institutions. The institution with the mission designation will control the assignment of responsibilities; the other institution has the option of accepting or rejecting those terms.
3. The institution with the mission designation accepts major program responsibilities, but contracts with the institution receiving the request for some services. The services and fees may vary and are agreed upon in writing.
4. The mission institution permits the institution originally contacted to develop and provide the program. However, granting and recording the credit is the mission institution's responsibility. Written permission is granted to the proposed sponsoring institution by the institution with the mission designation. Restrictions and terms should also be specified in writing at that time.

B. If the institution with the mission designation determines that the proposed program is not appropriate then no institution under the authority of the regents will offer the program unless it is reviewed and approved by the office of the commissioner.

IV. Definitions:

Direct costs are defined as the instructional costs associated with an individual course, such as instructor stipend, travel costs, rental of space for the course, and promotion of the course.

V. Cross-Reference:

Policy 220.1, Community College education centers

Policy 304.2 – Continuing Education; Non-credit Programs

Effective: November 18, 1999; Issued: December 10, 1999

I. Board policy

A. Direct costs for non-credit continuing education programs, whether designated non-credit or continuing education unit (CEU) programs, shall be self-supporting through collected fees or designated funds.

B. Indirect costs of non-credit continuing education programs shall be funded from collected fees or designated funds or in part through the current unrestricted operating funds of the unit.

C. Enrollment in continuing education non-credit programs shall not be counted and reported as part of each unit's regular enrollment, but shall be reported to the commissioner of higher education under guidelines to be established by the commissioner.

D. The units of Montana university system (MUS) are authorized to award the CEU as part of their continuing education programs.

E. Units of MUS shall maintain their present activities in continuing education and strengthen the cooperative effort among the six campuses, the colleges of technology, the community colleges and the private colleges.

F. Each campus shall establish procedures for the academic approval of continuing education non-credit offerings.

G. Credit options may be available for non-credit programs if the credit is approved by the appropriate academic unit. The total charge for credit option programs must be equal to or greater than the board of regents fee per credit hour for an equivalent number of hours. Exceptions to this fee structure may be granted by the commissioner of higher education.

H. If a course is proposed to be offered in a community, the institution located closest to that community shall be notified so that it can respond to the course proposal assuming the course falls within the role and scope of the closest institution. If that institution is unable or unwilling to respond to the course proposal the proposing unit may offer the course. Adjunct professors shall be supervised by the unit offering the course. The university units should include the private colleges, community colleges and the colleges of technology in the administration of this policy.

I. No institution shall withhold approval unless it actually plans to offer an essentially equivalent course in the same semester and in a location reasonably accessible to the same clientele.

J. Where possible, plans should be made to deliver structured educational programs rather than individual courses.

K. In courses in which veterans who are eligible for fee waivers are enrolled, the minimum class size may be increased by the number of such veterans.

L. The awarding of CEUs will be confined to those significant learning experiences at the postsecondary level for which academic credit is not traditionally awarded but which are of sufficient professional, technical or vocational stature as to merit some kind of recognition.

II. Administrative procedures:

When any campus of the MUS receives a request for a course, workshop, program, etc., which is not within the mission of that campus, the following procedures should be used. The continuing education department receiving the request should:

1. Inform the person making the request that someone from the MUS will contact them in the near future and
2. Contact the institution with the appropriate mission shall assume full responsibility for further follow-up of the request.

B. The continuing education department with the mission designation shall respond to the request for the continuing education activity by:

1. Determining the feasibility and/or appropriateness of the requested proposal.
2. Determining the method of delivery.

C. Contact with the person making the request may be necessary to obtain the information needed about the program. Regardless of the circumstances the person making the request should be contacted as soon as possible but no later than one week.

D. Activities which are multidisciplinary may be offered by an institution if the primary emphasis of the activity falls within the institution's mission. For example, The University of Montana could offer a workshop on "The Law and Nursing" provided the emphasis of the workshop is on law and not upon the practice of nursing.

E. An institution planning multidisciplinary activities should inform the other institutions with component programs. Joint sponsorship may be an advantage.

F. Approval by the other institution is not required provided the primary emphasis of the activity falls within the sponsoring institution's mission.

III. Options for Delivery.

A. The institution with the mission designation determines one of the four delivery systems as follows:

1. The mission institution delivers the complete program.
2. There is equal division of responsibilities and equal division of finances by co-sponsoring institutions.
3. The institution with the mission designation will control the assignment of responsibilities; the other institution has the option of accepting or rejecting those terms.
4. The institution with the mission designation accepts major program responsibilities, but contracts with the institution receiving the request for some services. The services and fees may vary and are agreed upon in writing.
5. The mission institution permits the institution originally contacted to develop and provide the program. However, granting and recording the credit is the mission institution's responsibility.

Written permission is granted to the proposed sponsoring institution by the institution with the mission designation. Restrictions and terms should also be specified in writing at that time.

B. If the institution with the mission designation determines that the proposed program is not appropriate then no institution under the authority of the regents will offer the program unless it is reviewed and approved by the office of the commissioner.

IV. Definitions:

A. One CEU is defined as ten contact hours of participation in an organized continuing education experience under responsible sponsorship, capable direction and qualified instruction. CEUs are not applicable to, nor can they be translated into, credits for a degree. This does not alter the prerogative of faculties to grant academic credit for nontraditional educational experiences such as CLEP, examination challenges, etc.

B. Direct costs are defined as the instructional costs associated with an individual course, such as instructor stipend, travel costs, rental of space for the course, and promotion of the course.

Policy 306 – Summer Session; General

Effective: November 18, 1999; Issued: December 10, 1999

Board policy Credit offerings for summer session courses must fall within the mission statements approved by the board of regents for each campus of the Montana university system.

Policy 309.1 – Course Credits: Short Courses and Workshops

Effective: September 30, 1977; Issued: September 28, 1994

I. Administrative policy

A. The method for awarding credit for short courses and workshops should be consistent with the method used in the regular academic program.

II. Procedures:

A. The credit awarded for short courses and workshops should be adjusted so that a full-time student normally earns credit at the rate of 1-1/2 credits per week, with a maximum of two credits per week.

B. If pre- or post-session work is required of students, the amount of credit awarded may be adjusted accordingly. Any such requirements should be clearly set forth in publicity and brochures.

C. If pre-session work is required, and a student arrives who has not done the work, he should be refused entrance to the workshop or short course.

III. Rationale:

Credit recommendations are expressed in semester credit hours. In determining semester hour recommendations, evaluators use the following guidelines:

A. One semester credit hour for each 15 hours of classroom contact plus 30 hours of outside preparation or the equivalent; or

B. One semester credit hour for each 30 hours of laboratory work plus necessary outside preparation or its equivalent, normally expected to be 15 hours; or

C. One semester credit hour for not less than 45 hours of shop instruction (contact hours) or the equivalent.

Appendix B. Program Sheets

Continuing Education, Extension, and Noncredit

Programming Purpose:

To provide alternative learning opportunities to citizens of all ages that enhance their personal and professional goals.

Goals/Objectives/Cost Principles

- Promote workforce training
- Promote professional development
- Community non-credit courses
- Continually improve program services
- Be self-supporting
- Support a portion of staff salaries and benefits
- Fees established based on cost analysis

Sampling of Programs:

- Workforce and Professional Development
 - Virtual Education Software – Teach recertification credits
 - Ed2Go – Miscellaneous workforce training
 - CCI – Softskills and health professions
 - HealthEdToday – Medical professional training
 - Infant/Toddler training (DPHHS) – state specific
- Conferences
 - Coaches clinics – Football, basketball, volleyball
 - Summer Institute for Educators
- Community/Youth
 - Safe Sitter
 - X-Camp

Program Staff:

Dean – Anneliese Ripley
Program Coordinator – Ryann Gibson
Program Coordinator – Marni Fifield

Extended Studies and Summer School

Programming Purpose:

To provide alternative and affordable post-secondary learning opportunities to eligible students and adults. This purpose is closely tied to the MUS's comprehensive community college mission to provide comprehensive, accessible, responsive, student-centered learning opportunities that support the achievement of individual's professional and community goals.

Goals/Objectives/Cost Principles

- Enable post-secondary student success
- Create greater access to postsecondary education
- Provide college-level courses and degree opportunities to niche targets with temporal or geographic limitations
- Support interdisciplinary and experiential learning opportunities
- Support delivery of distance degree programs
- Continually improve program services
- Contribute to campus FTE
- Be fiscally responsible with state funds
- Tuition and fees approved by Board of Regents
- Support a portion of staff salaries and benefits

Sampling of Programs:

- Summer School – 10-week session and X-Block
- Early College – Youth Challenge, dual credit, concurrent credit
- Off-campus Early Childhood Education – Fixed sites and online
- Off-campus Elementary Education – Butte
- Off-campus Secondary Education – Butte
- Online Endorsement Programs – Library, business technology, special ed.
- Online General Education Courses
- Farrier Certificate
- Driving Courses

Program Staff

Dean – Anneliese Ripley
Program Coordinator – Ryann Gibson
Program Coordinator – Marni Fifield

Road Scholar

Programming Purpose:

Road Scholar's program purpose is to provide high-quality, economical learning experiences to adults 55-years and older. The program purpose at Montana Western is tied to the MUS's comprehensive community college mission to enhance the development of Montana's communities and economy.

Goals/Objectives/Cost Principles

- Promote lifelong learning
- Program interdisciplinary and experiential learning opportunities
- Promote and preserve the historical, cultural and natural treasures of the State of Montana
- Continually improve program services
- Provide diversity of in programming to attract and retain program participants
- Remain one of the largest Road Scholar providers in the western U.S.
- Contribute unrestricted funds back to the campus
- Be self-supporting
- Fully support program staff salaries and benefits
- Program fees determined based on cost analysis

Sampling from more than 30 Distinct Programs:

- Intergenerational programs
- Hiking in Yellowstone
- Geology of Yellowstone
- Wildlife in Yellowstone
- Great Caldera
- Best of Montana
- Grand Teton Music Festival
- Colter's Hell

Program Staff:

Dean – Anneliese Ripley
Director – Penny Walde
Program Coordinator – Zack Baker

Sponsored Programs

Programming Purpose:

To develop extramural funding opportunities that enhance university programs, create partnerships and increase Montana Western's local, regional and national profile.

Goals/Objectives/Cost Principles

- Promote education programs
- Promote undergraduate and faculty research
- Obtain funding for scholarly and creative pursuits
- Return funds to the university to support facilities and administration
- Support staff salaries in business services and research offices
- Provide extramural funds for faculty buyout and contracted stipends

Sampling of Programs:

- Perkins – College transitions and career technical education
- Blackfeet Community College – Elementary Education Program
- HealthCare Montana – Healthcare training opportunities grant with Missoula College
- STARS for Quality and Montana Professional Development Grant - Partnership with DPHHS

Program Staff:

Dean – Anneliese Ripley
Program Coordinator – Ryann Gibson
Program Coordinator – Marni Fifield
Transition Specialist – Beth Wharton