THE UNIVERSITY *of* MONTANA WESTERN

AD HOC REPORT

Submitted to The Northwest Commission on Colleges and Universities March 1, 2023

Table of Contents

List of Figures

List of Tables

Introduction

The University of Montana Western (Montana Western), in response to the Northwest Commission on Colleges and University's (NWCCU) request (dated July 23, 2021), submits this ad hoc report to address Recommendation 1 from the Spring 2021 Mid-Cycle Review. Recommendation 1 reads as follows:

> *Continue to plan, collect, analyze, review, and refine meaningful indicators of institutional goals and objectives that define mission fulfillment, and use the findings to evaluate institutional effectiveness, assign resources, and inform and enhance student learning, achievement, and support services. (2020 Standard(s) 1.B.1; 1.B.2)*

The university's mission statement (approved 2020) reads as follows:

> *As a leader in and innovator in experiential education, the University of Montana Western educates undergraduate students through immersive practices in their field of study, strives for continuous improvement, and achieves evidence-supported student learning and achievement outcomes.*

This ad hoc report summarizes the university's ongoing efforts to support its established mission and improve institutional effectiveness. The framework for these efforts is articulated in the university's strategic plan, *Building on the Promise of Experience One*. Baseline metrics and 2026 targets were established in the 2021 Mid-Cycle Review.

The impacts of the COVID-19 pandemic on student recruitment, retention, and completions, from AY21 to AY23, have been challenging for all Montana University System (MUS) campuses. In moving forward from the 2021 Mid-Cycle Review, Montana Western recognized a few institutional metrics would be lower than prior three-year averages, yet it chose to retain high targets. Rather than lower its targets, the university committed itself to moving forward with a renewed focus on serving students, promoting student achievement, and differentiating itself through *Experience One.* It does so with optimism for its future and confidence in its mission.

That commitment has paid off. Despite the COVID-19 pandemic, Montana Western has documented many successes resulting from a culture of continuous improvement. Over the past few years, the university has repeatedly gained recognition as an hidden gem and three baccalaureate programs have ranked among top universities for Education, Environmental Science and Early Childhood Education. At a glance, Montana Western represents a small, certificate-, associate-, and baccalaureate-granting institution serving 36 percent males, 75 percent in-state students, and 16 percent identified racial minorities.

Process for Improvement

[The Great Resignation](#) and reshuffle started late in 2020 in response to the COVID-19 pandemic. Montana Western was not immune. Nearly 30 percent of faculty and 40% of staff in Fall 2022 were new since March 2020. In AY20, the university employed 150 faculty/staff FTE. Since the fall of 2020, 24 faculty and staff have retired (16 percent). The university budgeted for 143 faculty/staff FTE in AY23 and nine positions are currently open—representing an 11 percent decline in faculty/staff FTE from AY20 to AY23.

Staffing changes have occurred at all levels of the institution, and more than 50 percent of senior leadership positions have been hired within the past two years. A summary of leadership changes since May 2021 is provided in [Appendix A](#).

Although many faces and some processes are new, the institution has not backed away from its mission, its strategic plan, nor its commitment to continuous improvement. Montana Western's leadership is committed to the tenets of continuous improvement as presented in the [2021 Mid-Cycle Review](#) (pgs. 24-25), illustrated in Figure 1, and articulated in NWCCU Standard 1.B.1.

Figure 1. Model of Continuous Improvement

NWCCU Standard 1.B.1

The institution demonstrates a continuous process to assess institutional effectiveness, including student learning and achievement and support services. The institution uses an ongoing and systemic evaluation and planning process to inform and refine its effectiveness, assign resources, and improve student learning and achievement.

Institutional Effectiveness

Multiple groups are tasked with ongoing evaluation of institutional effectiveness. These groups include the Chancellor's Council, Chancellor's Cabinet, Faculty Senate, and Division Chairs. Each of these groups rely on verifiable data to be most effective. Montana Western's new fulltime director of institutional research provides the data.

The Chancellor's Cabinet includes Chancellor Reid's direct reports (provost and vice chancellor for academic affairs; vice chancellor for administration, finance, and student affairs; director of development and alumni relations; director of athletics; and director of university communications), faculty senate chair, student senate president, director's council chair, dean of students, and dean of strategic initiatives. This group meets every other week to develop policy, review institutional metrics, and engage in tactical discussions.

The Chancellor's Council is a subset of the full cabinet. It includes the two vice chancellors and two deans. This group meets daily for a half-hour briefing on emergent issues that span the full extent of the university. The council also meets alternate weeks from the Chancellor's Cabinet for deeper strategy and planning discussions.

Faculty Senate, Student Senate, and Division Chairs also share responsibilities for institutional governance and assessment of programs, services, and student success. There is planned crossover between these leadership groups to ensure different perspectives and voices are heard.

Student Learning

Student success is assessed at the institutional level and student learning is assessed at the program level. Outside of department specific program assessment (seven-year reports), faculty representatives on the Assessment Committee and General Education Committee meet regularly to compile, evaluate, and assess program and essential learning outcomes. The Assessment Committee summarizes their findings and recommendations in an annual report to leadership.

Assign Resources

Ultimately the chancellor has authority for assigning campus resources, but he does so with input from others. The vice chancellor for administration and finance leads a budget committee that reviews the state allocation, follows general spending parameters established by the Board of Regents (BoR), and aligns campus budget requests with strategic plan objectives. The budget committee is comprised of a broad constituency of faculty, students, staff, and the Chancellor's Council. The committee is data-driven and relies on information obtained by the institutional researcher and vice chancellor for administration and finance.

Strategies for Institutional and Student Success

Montana Western's [strategic plan](#) includes four objectives: 1. Strengthen the Experience One program, 2. Enhance degree-seeking student recruitment, retention, and graduation, 3. Enhance and diversify fiscal resources, and 4. Modernize and update the university's infrastructure. Each objective includes numerous indicators of achievement, baseline metrics and 2026 target metrics—monitoring of the indicator metrics follows in the next section. The list below summarizes some of the university's strategies for addressing the objectives and achieving the established targets. The list is not exhaustive, and explanations are highly abbreviated (links to some websites are provided for additional information). Each bulleted item is carefully planned and evaluated by university leadership to achieve the intended outcomes, support the university's mission, assign resources, and determine effectiveness.

- Strengthen the Experience One Program
    - [Academic Road Map](#) – Completed Fall 2022
    - Experience One Faculty Awards – First awards in AY22
    - First-Year Experience – Started Fall 2021
    - National Survey for Student Engagement – On schedule for Spring 2024
    - Center for Experiential Education – Fall 2023
- Enhance Degree-Seeking Student Recruitment, Retention and Graduation
    - [Montana 10](#) – Planning in AY23, implementation in Fall 2023, [Montana 10 fact sheet](#)
    - TRIO Student Support Services program since Fall 2001
    - ACES – Peer mentoring program initiated in Fall 2022
    - Central Application, [Apply Montana](#) – Live Fall 2021
    - Director of Student Success – New hire Fall 2022
    - Withdrawal intervention team and emergency fund established, Fall 2022
    - Fulltime Registrar – Fall 2022
    - Degree Works – Live Fall 2023
    - Director of Institutional Research – Fulltime Fall 2022
    - Strategic Enrollment Management Plan – Nearing completion Spring 2023
    - [Athletics Strategic Plan](#) – Completed Fall 2022
- Enhance and Diversify Fiscal Resources
    - Administrative Assessment – Funds for academic initiatives and business services
    - CARES Act Funds – used for safety, technology, stabilization, lost revenue recovery
    - Grants – More faculty grants, increase facilities and administration revenue (F&A), F&A rate renewal (31.1% of modified total direct costs)
    - Fundraising – capital projects, wellness center, scholarships, Experience One fund, [Experience One Campaign](#) [$11.8M raised](#)
    - Investments

Modernize and Update the University's Infrastructure

- o Block Hall Renovation – In design planning stage, construction in 2024
- o Electronic key access – Safety and security project nearing completion 2023
- o 110 new parking spaces behind BARC and former motor pool – Completed 2022
- o Transition IT Services to cloud computing (Banner 9) – completed 2022
- o Expand bandwidth to 2G Capacity – Completed 2021
- o Hybrid Classrooms – One completed in 2022, two more under development
- o Student Wellness Center – Planning design stage, construction to begin in 2024
- o Football Stadium – Fundraising stage, construction to begin 2025
- o Bulldog Lounge remodel – Completed 2022
- o Youth Challenge dining hall – Completed 2022
- o Centralize HVAC Control Systems – Completed 2021
- o Atlantic Street Access Project – Completed 2022

Continuous Monitoring

NWCCU Standard 1.B.2

The institution sets and articulates meaningful goals, objectives, and indicators of its goals to define mission fulfillment and to improve its effectiveness in the context of and in comparison with regional and national peer institutions.

The university established indicators, baseline metrics, and 2026 targets for each of its four strategic objectives in 2020. The metrics are based on national and state measures established by the U.S. Department of Education and the Montana University System (MUS). Baseline metrics were informed by prior 3-year averages and historical campus performance. The following sections summarize annual progress toward meeting the 2026 targets. Where appropriate, comparisons with peer institutions are also presented.

Objective One – Strengthen the Experience One Program

Montana Western's academic program is referred to as *Experience One*. Experience One is unique among public, baccalaureate institutions because it utilizes block scheduling to promote immersive teaching and learning practices and experiential education. Students enroll in one course at a time over an 18-day period, meeting three hours a day. Many of the activities promoted by Experience One are identified as high impact practices (HIPs), e.g., service learning, research, internships, student teaching, and culminating senior experiences. Measuring engagement in HIPs is a means for assessing fulfillment of the institution's experiential mission (Table 1).

Table 1. Indicators for Objective One – Strengthen the Experience One Program

Indicator	AY20 Baseline*	AY21	AY22	AY23	2026 Target
Feasibility study for Experience One Institute	NA	Identify leaders to conduct feasibility study	Campus discussions about best approach	*Center for Experiential Education* proposal submitted for BoR approval	~~Experience One Institute~~ *Center for Experiential Education*
Percent of students who complete at least two documented high impact practices prior to graduation (NSSE)	Freshmen 12% Seniors 74%	Freshmen 5% Seniors 65%	The established metrics for each indicator rely on indirect NSSE data, which are collected every three years. The next NSSE survey will be administered in Spring 2024. In the meantime, UMW has established an institutional research position that is tasked with tracking participation in HIPs through the campus student records system. These efforts are still in their infancy, but direct tracking of participation in HIPs should be in place by the end of AY24.		>85%
Percent of students who engage in undergraduate research with faculty mentors (NSSE)	Freshmen 8% Seniors 22%	Freshmen 4% Seniors 23%			>30%
Percent of seniors who participate in internships, student teaching, or a culminating senior experience (NSSE)	Sr. Exp. 42%	Sr. Exp. 32%			>80%
Percent of students who engage in service-learning projects (NSSE)	Freshmen 16% Seniors 27%	Freshmen 55% Seniors 78%			>30%
Equitable inclusion of students in experiential learning activities	Under review	NA	The current approach does not allow for reliable assessment of equitable inclusion. This is a task for the new institutional research function.		Under development w/ input from Dir. of Student Success
Note. 2018 National Survey for Student Engagement (NSSE) metrics. * Baseline metrics and targets established in the 2020-2026 Strategic Plan.					

The first target indicator in Table 1 calling for establishment of an Experience One Institute resulted in a change of focus and name. The Experience One Institute was envisioned to be an outward facing entity that researched, published, promoted, and consulted on experiential educational practices. An internal assessment of needs reframed the charge to focus on faculty development and research. The faculty's' proposal for the Center for Experiential Education

received all necessary campus approvals and is currently being considered for approval by the Montana BoR.

At its core, Montana Western is a teaching institution—its commitment to faculty development is a commitment to teaching excellence. Since AY20, five faculty have received external teaching awards: Dr. [Estee Aiken](#) for innovations in teaching and learning; Drs. [Rob Thomas](#) and [Bethanie Blankenship](#) for activating general education through high impact practices; Dr. [Nanci Red Bird](#) for equity-minded pedagogies, and Dr. [Denise Holland](#) for career and technical education. Each of these individuals has made exemplary contributions to teaching and learning and will serve as faculty mentors in the newly established Center for Experiential Education.

The rest of the indicators in Table 1 rely on data from the National Survey of Student Engagement. Montana Western has three sets of these data – 2015, 2018 and 2021. The data are useful indicators of student engagement relative to other participating institutions, but the results are difficult to assess longitudinally, they do not capture full participation in HIPs, and in practice the previously established 2026 targets are ambiguous. Interim Provost McNulty made several attempts to measure academic engagement in HIPs, but institutional priorities shifted during the COVID-19 pandemic, and the effort was dropped. Now that the university has hired a permanent provost, fulltime institutional researcher, and fulltime registrar, the effort will continue.

Objective Two – Enhance Degree Seeking Recruitment, Retention and Graduation
Measuring, assessing, and improving student success metrics is a means to assess fulfillment of the institution's mission of student achievement and continuous improvement. Montana Western tracks standardized student success metrics internally and compares its performance against peer institutions. These metrics are summarized in Tables 2 through 8. A summary of findings follows each table.

Table 2. Indicators for Objective Two – Degree-Seeking Students

Indicator	AY20 Baseline*	AY21	AY22	AY23	2026 Target*
Increase degree-seeking enrollment 1-3% annually, for a total growth of 14% (Fall term)	1,279	1,292 (+1%)	1,264 (-2%)	1,254 (-0.7%)	1,454
Increase underserved student enrollment by 1-3% annually, for a total growth of 14% (Fall term)	663	667 (+0.6%)	675 (+1%)	648 (-4%)	765
Notes. * Baseline metrics and targets established in the 2020-2026 Strategic Plan. Metrics are based on end-of-term enrollments.					

In AY21, the number of degree-seeking enrollments increased one percent over the AY20 baseline. Degree-seeking enrollments decreased slightly in AY22 and again in AY23. The overall degree-seeking enrollment dropped two percent between AY20 and AY23. Underserved student enrollments similarly dropped two percent between AY20 and AY23. Last fall, the campus admitted its largest freshman class since 2017. The Fall 2022 incoming class represents an 18 percent increase over Fall 2020. This increase suggests the university will experience growth in degree-seeking enrollment numbers as these students declare majors. The university expects enrollments to continue to grow as post COVID-19 impacts lessen and the institution upgrades facilities, continues to improve its online marketing and web presence, employs multiple student-success strategies, strengthens the Experience Once program, and expands scholarship opportunities.
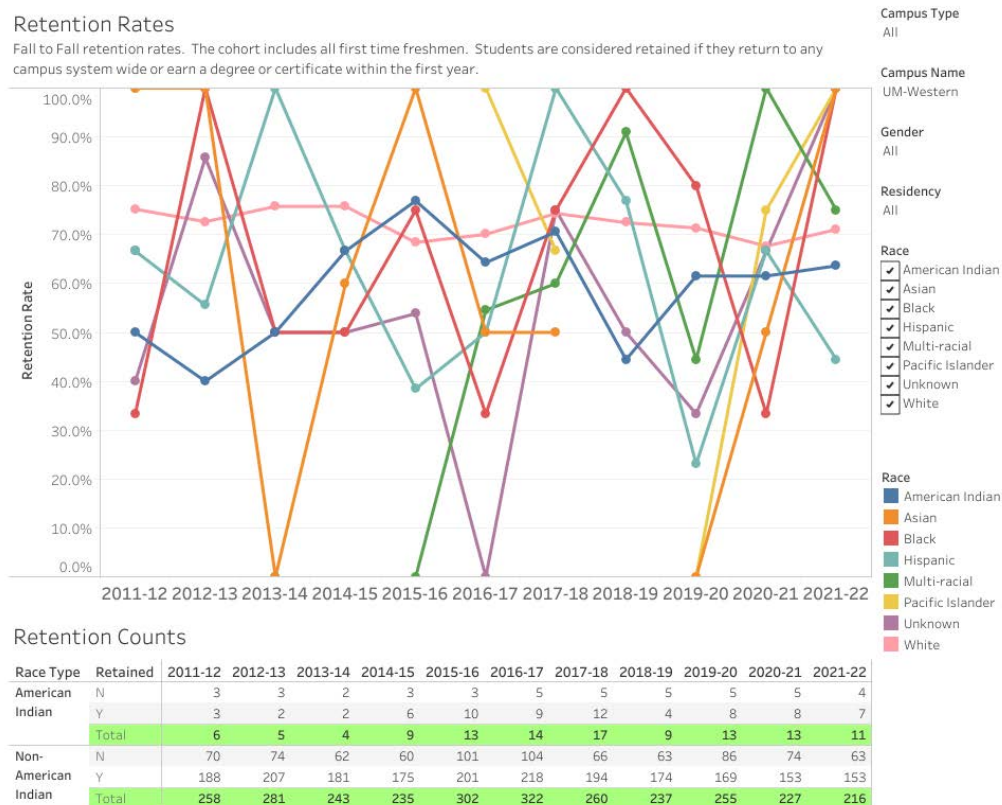
Table 3. Indicators for Objective Two – Student Engagement

Indicators	AY18 Baseline*		AY21		AY22	AY23	2026 Target*
Outperform comparator institutions based on student engagement indicators (*NSSE QI and SE)	FR QI: 42.5 SE: 38.0	SR 43.4 30.9	FR QI: 44.0 SE: 32.3	SR 44.4 32.5	This indicator relies on NSSE data--the next survey will be administered in 2024. UMW compares well against its NSSE peers; however, supportive environment needs improvement. (e.g., diversity and social involvement)		Prior baseline goals were not useful and needed refinement. The new goal is to exceed NSSE peers.
Student engagement and success indicators will reflect equitable inclusion of all student groups (NSSE QI and SE)	NSSE baseline established in 2018		UMW's NSSE sample size and data do not allow for reliable assessment of this indicator. The NSSE supportive environment (SE) questions do indicate that students report lower percentages of positive responses to two questions related to encouraging contact among students from diverse backgrounds and attending events that address important social, economic, and political issues.				The new goal is to exceed NSSE peers in 2024. New diversity goals also need to be developed.
Notes. 2018 & 2021 National Survey of Student Engagement (NSSE) Quality of Interaction (QI) and Supportive Environment (SE) indicators. Freshmen (FR). Seniors (SR) * Baseline metrics and targets established in the 2020-2026 Strategic Plan.							

By themselves, the 2021 NSSE student engagement data and trends are difficult to interpret. They represent percentages of students who responded favorably to questions about the quality of their interactions with others and the supportive environment on campus. The results are then compared to other institutional groups. Montana Western chooses to compare itself to other Rocky Mountain public institutions, Carnegie public baccalaureate/diverse institutions, and select peers (which include its aspirational peers). When compared to peers, Montana Western's student responses are compelling. Montana Western's first-year students respond more favorably than comparator first-year students to questions regarding learning with peers and experiences with faculty. Montana Western's seniors respond more favorably to questions regarding academic challenge and experiences with faculty (pg. 3 of Engagement report). Although not significantly below other groups, Montana Western senior and first-year students respond less favorably to questions regarding supportive campus environment (pgs. 12 and 13 of Engagement report), particularly related to encouraging contact among students from diverse backgrounds and attending events that address important social, economic, and political issues. This is an issue that the campus leadership is aware of and attempting to address through academic affairs and student success programming.

Figure 2 shows Montana Western's retention trends by race from AY12 to AY22. It illustrates the volatility of minority race retention data, which is tied directly to small sample sizes. Montana Western's AY23 student demographic profile is 83 percent white, the remaining 17 percent is broken into seven categories, none of which exceeds 5 percent.

Retention Rates

Fall to Fall retention rates. The cohort includes all first time freshmen. Students are considered retained if they return to any campus system wide or earn a degree or certificate within the first year.

Campus Type
All

Campus Name
UM-Western

Gender
All

Residency
All

Race
- ✔ American Indian
- ✔ Asian
- ✔ Black
- ✔ Hispanic
- ✔ Multi-racial
- ✔ Pacific Islander
- ✔ Unknown
- ✔ White

Race
- ■ American Indian
- ■ Asian
- ■ Black
- ■ Hispanic
- ■ Multi-racial
- ■ Pacific Islander
- ■ Unknown
- ■ White

Retention Counts

Race Type	Retained	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
American Indian	N	3	3	2	3	3	5	5	5	5	5	4
	Y	3	2	2	6	10	9	12	4	8	8	7
	Total	6	5	4	9	13	14	17	9	13	13	11
Non-American Indian	N	70	74	62	60	101	104	66	63	86	74	63
	Y	188	207	181	175	201	218	194	174	169	153	153
	Total	258	281	243	235	302	322	260	237	255	227	216

Figure 2. Retention Trends by Race

Native Americans comprise the largest minority race at Montana Western. Table 4 highlights the last three years of Native American data shown in Figure 2. The number of students who identify as Native American has doubled since AY12 and retention rates have increased from 50 percent to more than 60 percent. Although not has high as non-native retention, Native American retention is within 6 percentage points of cohort totals (1 to 2 students).

Table 4. Indicators for Objective Two – Native and Non-Native American Student Retention

Retention	AY20		AY21		AY22	
	Number	Percent	Number	Percent	Number	Percent
Native American	8/13	62	8/13	62	7/11	64
Non-Native American	169/255	66	153/227	67	153/216	70
Total	177/268	66	161/240	67	160/227	70
Note. Data from Figure 2 and MUS American Indian Student Success Dashboard						

The MUS Dashboards indicate Native American students at Montana Western increased from 4 percent in AY20 to 9.2 percent in AY23. System percentages for the same period increased from 5.5 percent to 5.9 percent. Montana Western has purposefully increase support of Native American students in its teacher education program. The efforts are funded by grants awarded by the U.S. Department of Education. The growth and retention of Native American students is strategically significant in addressing statewide teacher shortages, expanding equity and inclusion efforts, diversifying campus revenues, and meeting future performance funding targets.

In 2013, the MUS adopted a funding model that set aside 8 percent of the state appropriate for allocation based on meeting MUS performance metrics. Table 5 summarizes Montana Western's performance metrics and targets.

Table 5. Indicators for Objective Two – MUS Performance Funding Metrics

Performance Funding Metric	AY20 Baseline*	AY21	AY22	Prior 3-Yr Ave.**	2026 Target*
First-to-second year, first-time student retention rate	70%	69%	66%	68%	75%
Associate	62%	44%	58%	56%	64%
Bachelor	76%	72%	70%	72%	77%
Fall-to fall retention of all incoming undergraduates and transfers	69%	65%	68%	66%	≥ Prior 3-year average
Pell-eligible students	71%	65%	67%	67%	
American Indians	46%	60%	76%	45%	
Non-traditional	54%	55%	52%	52%	
Veterans	92%	60%	57%	75%	
Annual undergraduate degrees awarded	420	342	425	445	450
Certificate degrees	23	29	29	23	20
Associate degrees	139	135	135	181	200
Bachelor degrees	258	258	261	240	235
Dual enrollment participation					
Headcount	123	155	115	119	150
FTE	47.13	46.59	43.6	41.75	60
Performance Funding Allocation	**100%**	**100%**	**86%**	******	**100**
Note. MUS performance metrics are calculated on BoR methodology, not IPEDs. Performance funds account for 8% of state revenue. *Baseline metrics and targets were established in the 2019 Year One Report. **The prior three-year average changes every year.					

Up until AY21, Montana Western received 100 percent of its performance funding allocation. The metrics in Table 5 show declining retention, degree completion and dual enrollment participation beginning in AY21 and continuing through AY22. AY23 was the first time the university did not receive its full performance funding allocation. Seven out of twelve MUS campuses did not receive 100 percent of their AY22 performance funding (the lowest allocation was 55 percent). In AY 23, Montana Western received 37 percent of its allocation. Nine MUS campuses did not receive 100 percent in AY23 (the lowest allocation was 22 percent). The metrics are improving relative to the prior 3-year averages and Montana Western is projected to receive 87 percent in AY24.

The Office of the Commissioner of Higher Education (OCHE) previously reallocated performance funds as one-time-only improvement grants. During the COVID-19 pandemic, the OCHE staff opted to retain the funds to pilot a new program, called Montana 10. The program offers academic, social, and financial supports designed to help students succeed in college. The pilot started with two MUS campuses in Fall 2020, another campus joined in Fall 2021. Montana Western volunteered to join during AY23 and will serve its first cohort in Fall 2023.

In addition to using the MUS Dashboards to compare itself against state peers, Montana Western uses the Integrated Postsecondary Education Data System (IPEDS) to compare itself against six self-selected institutions. Two comparators are aspirational, private block-schools, four are public regional institutions in Idaho, Montana, North Dakota, and Oregon. Tables 6 through 8 summarize retention, graduation, and transfer-out rates for Montana Western and the six comparators. Montana Western's goals for retention, graduation, and transfer-out rates are to meet or exceed its own 2022 targets and to exceed the average of the identified comparators.

Table 6. Indicators for Objective Two – Peer Retention Comparisons

Comparator Schools	AY19		AY20		AY21	
	Full Time	Part Time	Full Time	Part Time	Full Time	Part Time
Colorado College	96%		86%		96%	
Cornell College	76%		74%		78%	
Dickinson State University	68%	38%	63%	67%	65%	25%
Lewis-Clark State College	60%	40%	61%	22%	63%	35%
Montana State University-Northern	55%	40%	70%	25%	70%	0%
The University of Montana-Western	**76%**	**14%**	**73%**	**33%**	**73%**	**0%**
Western Oregon University	74%	22%	71%	32%	65%	30%
Average of Comparators (excluding Montana Western)	72%	35%	70%	37%	73%	30%
Montana Western 2022 Target	**≥75%**					
Source. Integrated Postsecondary Education Data System (IPEDS). Aspirational, block-school peers are represented in shaded text. Montana Western is represented in bold text. Blank cells indicate no data was reported. Montana Western's 2022 target was established in the Year One Report.						

Despite shared impacts from the COVID-19 pandemic, there are no universal retention trends shared among all seven institutions. Montana Western, like most of its comparators, experienced a decline in student retention from AY19 to AY20. Student retention reported by private aspirational peers rebounded between AY21 and AY22. Student retention reported for public regional peers flattened. Montana Western's AY21 retention rate, 73 percent, is two points below its 2026 target of 75 percent, but it has consistently been above the comparators' average. Montana Western's participation in Montana 10 should help increase student retention above the 75 percent target. The university is actively raising funds for scholarships and infrastructure improvements (The Experience One Campaign), which should also increase student retention rates.

Table 7. Indicators for Objective Two – Peer 150% Graduation Comparisons

Comparator Schools	AY19		AY20		AY21	
	Overall	Bachelor	Overall	Bachelor	Overall	Bachelor
Colorado College	83%	83%	88%	88%	86%	86%
Cornell College	69%	69%	67%	67%	64%	64%
Dickinson State University	41%	40%	36%	36%	36%	36%
Lewis-Clark State College	38%	32%	36%	31%	37%	32%
Montana State University-Northern	31%	27%	35%	35%	31%	35%
The University of Montana-Western	**49%**	**45%**	**47%**	**49%**	**42%**	**39%**
Western Oregon University	41%	41%	45%	45%	48%	48%
Average of Comparators (excluding Montana Western)	51%	47%	51%	50%	50%	50%
Montana Western 2022 Target	**≥47%**					
Source. Integrated Postsecondary Education Data System (IPEDS) – First-time cohort. Aspirational, block-school peers are represented in shaded text. Montana Western is represented in bold text. Blank cells indicate no data was reported. Montana Western's 2022 target was established in the Year One Report.						

The graduation rates summarized in Table 7 do not share universal trends except that they are more stable than the retention data—fluctuating less than 10 percentage points over a three-year period. Montana Western's overall rate dropped from 49 to 42 percent. The university's rate was lower than its aspirational peers and Western Oregon University. The university has some work to do to achieve its overall target of 47 percent and exceed the average of its comparators. The strategies for improvement and student success presented in this report, (e.g., Montana 10, ACEs, TRIO SSS, scholarships, student wellness center, and new stadium) are all planned to increase student engagement and student success and to raise graduation rates above the 47-percent target.

Table 8. Indicators for Objective Two – Peer Transfer-Out-Rate Comparisons

Comparator Schools	AY19	AY20	AY21
Colorado College			12
Cornell College	24	26	25
Dickinson State University	32	30	32
Lewis-Clark State College	22	15	20
Montana State University-Northern	11		
The University of Montana-Western	**27**	**20**	**29**
Western Oregon University			
Average of Comparators (excluding Montana Western)	22	24	22
Montana Western 2022 Target	**≤28%**		
Source. Integrated Postsecondary Education Data System (IPEDS) – 150% graduation rate, first-time cohort. Aspirational, block-school peers are represented in shaded text. Montana Western is represented in bold text. Blank cells indicate no data was reported. Montana Western's 2022 target was established in the Year One Report.			

Transfer-out rates decreased for all public regional comparators from AY19 to AY20 and increased from AY20 to AY21. The trend was reversed for Cornell College, a private block school. These trends may be related to how individual institutions responded to the COVID-19 pandemic – cancelled classes, on-line classes, mask mandates, quarantines, etc. Montana Western's transfer-out rate in AY21 was one point higher than its 28-percent target and seven points higher than the comparators' average (22 percent). The university committed itself to reducing the transfer-out rate by establishing the ACES peer-mentoring program and a withdrawal intervention team in AY23. ACES and the withdrawal intervention team have been able to assist several potential transfers with peer-to-peer advising, emergency scholarship funds, and advocacy. Business Services also recently changed its dropping for non-payment policy—instead of automatically dropping students for non-payment, the withdrawal intervention team contacts students on the list. The team has been able to keep most students in school by helping them complete FAFSA applications to receive financial assistance. The additional financial, purpose, belonging, and academic supports provided by the Montana 10 program are also expected to help reduce transfer-out rates.

Objective Three – Enhance and Diversify Fiscal Resources

Montana Western's unrestricted operating budget for AY23 was $15 million (55 percent state support, 40 percent tuition, and 4 percent other). The university's expenditures per FTE are consistently below the other four-year MUS campuses. In AY23, budgeted expenses per student were $1,657 lower than the next lowest MUS campus (MUS Dashboards). To attract, support, and retain students, the university must diversify its fiscal resources. The fiscal indicators in Table 9 are not exclusive, but they do highlight the institution's focus on endowments, grants, donations, and auxiliary income to diversify revenues.

Table 9. Indicators for Objective Three - Enhance and Diversify Fiscal Resources

Indicator	AY20 Baseline*	AY21	AY22	2026 Target*
Increase annual scholarships	$300,000	$511,988	$456,508	$400,000
Raise funds for the Experience One endowment	$22,847	$57,500	$100,212	$2,000,000
Increase annual indirect cost revenue	$75,265	$87,720	$621,838 *Grants $103,542* *HEERF $518,296*	$130,000
Standardize administrative assessment on designated and auxiliary functions	Not consistent	Under review and development by the AY23-24 budget committee.		Standard policy for all
Increase Foundation grants in support of academics	$30,000	$214,752 *Academics $113,866* *Scholarships $61,876* *Athletics $24,102* *Foundation $14,908*	$101,916 *Scholarships $86,916* *Athletics $15,000*	$250,000
Increase the number of annual individual gifts	1,259	1,309	1,439	1,500
Note. * Baseline metrics and targets established in the 2020-2026 Strategic Plan.				

The indicators in Table 9 show that the university is exceeding its 2026 targets. The Foundation raised $1.8M in AY22 and recently announced reaching $11.8M in its historic Experience One Campaign. The campaign goal is to raise $13M funds for student scholarships, faculty research (Experience One fund), a student wellness center, and a new athletic stadium (Sports and Activities Complex). Table 10 summarizes growth in Experience One funds awarded for the first-year experience program and faculty research from AY21 to FY23.

Table 10. Annual Experience One Fund Awards

Awards	AY21	AY22	AY23
Number	6	7	16
Amount	16,103	$32,167	$47,934
Note. Awards were made by the Montana Western Foundation. Each year $4,000 was awarded for the first-year experience program. The remaining funds were awarded in support of faculty-led research.			

The university also experienced growth in its sponsored research activities between AY20 and AY22. Grant expenditures have generated higher than projected indirect cost revenues for discretionary spending.

Objective Four – Modernize and Update Infrastructure

The fourth strategic objective is focused on modernizing and upgrading the campus infrastructure, which includes buildings, technology, deferred maintenance projects, and parking. Table 11 summarizes progress toward meeting the 2026 targets.
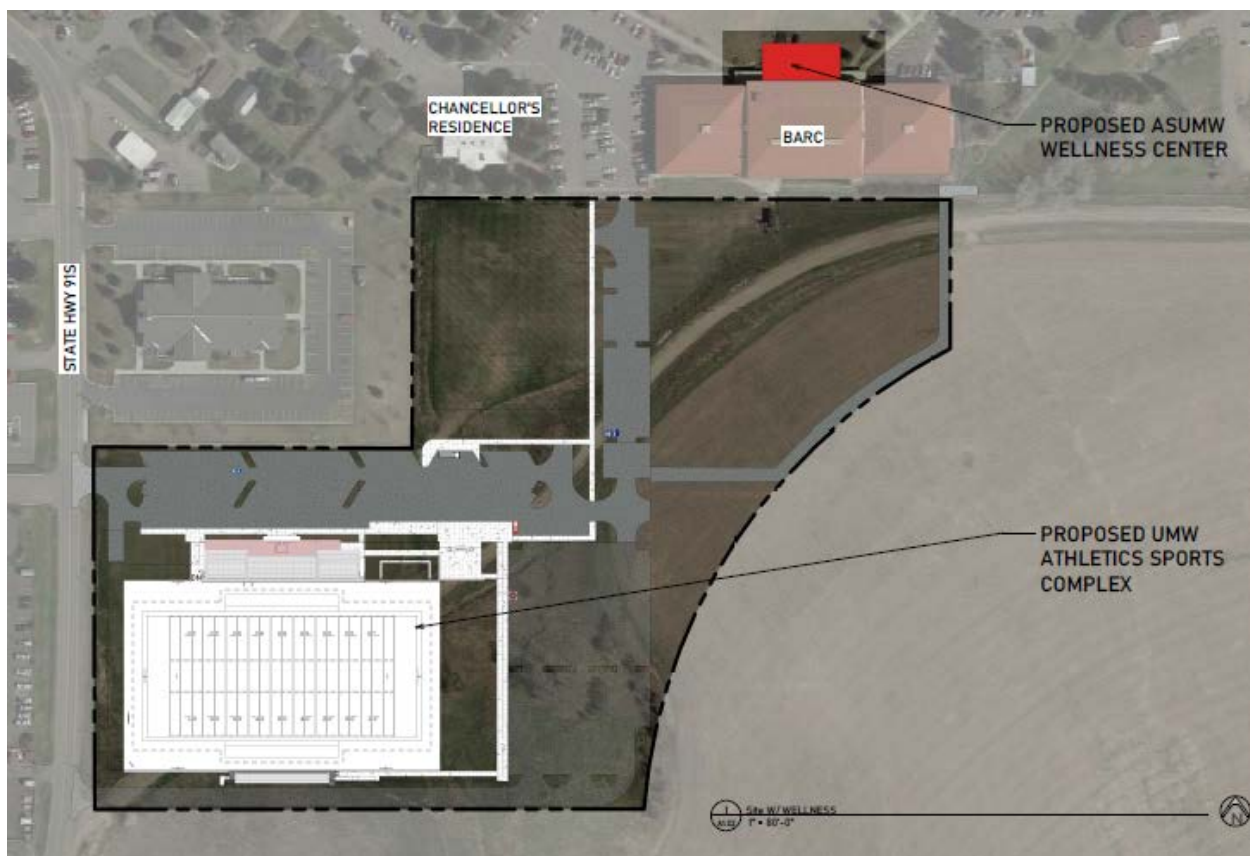
Table 11. Indicators for Objective Four – Modernize and Update Infrastructure

Indicator	AY20 Baseline*	AY21	AY22 & AY23	2026 Target*
Reduce deferred maintenance inventory by 1 percent (baseline number increases annually)	$10,326,645	Questions have arisen as to how to accurately measure this metric. It was derived from a facility condition assessment, (FCA) which is not a cost model. Found to be an antiquated approach.		$10,223,378 – Metric needs revision based on the long-range building projects (LRPB) process
Modernize HVAC systems	Not all controls connected to centralized Heat Plant control	Pneumatic controls were replaced with digital controls across campus. All HVAC controls were integrated into a common control platform and are visible and operated from the heating plant.		Centralized control systems – Block Hall systems will be integrated with renovation project
Expand and improve student recreational facilities and wellness opportunities as identified in the Campus Master Plan	Auxiliary gym and Keltz arena flooring worn out. No space for wellness programming. Plans for new stadium with artificial turf.	Sports and Activities Complex Planning and fundraising underway A new student wellness center was approved and is intended to be operational by 2024.		New flooring in BARC complex (gym and arena), new stadium with artificial turf, new wellness/rec center
Invest in infrastructure priorities as identified in the Campus Master Plan	SUB and dining facilities are outdated, Atlantic Street unattractive and not accessible	Dining Hall Upgrade, Mathews Hall bathrooms	Atlantic Street renovation & Heating Plant Upgrade & Bulldog Lounge	See Master Plan
UMW bandwidth, redundancy, and network speed	1 gig capacity with normal traffic bandwidth	Completed summer 2021	Banner migration to Cloud complete	2 gig capacity – Target met
Parking demand (lot occupancy) during peak utilization	Parking is limited and often at capacity (95% occupancy or above)	<95% capacity	Added 110 spaces for commuter, residential and reserved, <95% capacity	Implement programs/incentives to enhance campus accessibility and reduce parking occupancy rate
Note. * Baseline metrics and targets established in the 2020-2026 Strategic Plan.				

Montana Western has met or is making progress toward all the established targets and has completed additional improvements. In addition to those listed in Table 10, the campus has completed a heating plant upgrade, Youth Challenge dining hall upgrade , Bulldog Lounge remodel, and Atlantic Street renovation project. Additional projects that are in planning stages

or nearing completion include the Bulldog [Sports and Activities Complex](#) , Student Wellness Center, LED lighting upgrade, electronic-card-swipe-building-access system, and [Block Hall Renovation](#) with associated storage facility to increase research and academic space. Progress on each of these projects is regularly updated by [Facilities Services](#). All the projects are carefully planned and managed to enhance students' academic and extramural experiences, reduce costs, improve safety and security, and improve efficiency.

Summary

Recommendation 1 from the Spring 2021 Mid-Cycle Review is concerned with continuing to plan, collect and analyze, review, and refine meaningful indicators of institutional goals and objectives that define mission fulfillment. Montana Western's mission is to educate student through immersive practices in the field of study, strive for continuous improvement, and achieve evidence-supported student learning and achievement outcomes. This document reported progress toward achieving or refining the strategic indicators and objectives established in the university's strategic plan.

The past three years (AY20, AY21, and AY22) have been particularly challenging as the entire world responded to the COVID-19 pandemic. Despite lower than expected enrollments, retention, performance revenue, and degree completions, as well as higher than expected transfer-out-rates and staff and faculty turnover, Montana Western achieved great success. The leadership team is stable and functioning with a deep commitment to continuous improvement. Fall 2022 enrollment numbers indicate renewed growth. Performance funds will increase in AY24. Comparisons against state, regional, and aspirational peers indicate Montana Western is performing better than or near peer averages. The university started new student success strategies—e.g., Montana 10, ACES, First-Year Experience, and the withdrawal intervention team. Fundraising efforts have produced record donations in support of scholarships, faculty research, and capital improvements. Grant awards and expenditures have increased. Numerous technology and facility improvement projects have been completed and more projects are in planning stages. All of the successes were the result of careful planning, allocation of resources, and project refinements.

Moving forward the university will continue to focus its efforts on serving students, promoting student achievement, and differentiating itself through *Experience One.* It does so with a dynamic leadership team that is data-driven, self-reflective, and committed to building on the *[Promise of Experience One](#)*.

Appendix A

Personnel Changes since May 2021

- Mr. Michael Reid became chancellor, May 2021
- Mr. Mel Ewing became director of Information Technology Services, June 2021
- Mr. Michael Fueling appointed Athletic Director and Development Officer, November 2021
- Dr. Jenny McNulty served as interim provost, August 2020 to May 2021
- Dr. Ashley Carlson served as interim provost, June to December 2021
- Dr. Johnny MacLean became provost and vice chancellor of academic affairs, January 2022
- Ms. Bethany Hauer served as director of student success, September to February 2022
- Ms. Tricia Fiscus became vice chancellor of administration, finance, and student affairs (position split with Helena College, October 2021
- Dr. Anneliese Ripley became dean of strategic initiatives, July 2022
- Ms. Charity Walters promoted to fulltime director of institutional research, August 2022
- Ms. Jamie Ochoa hired as fulltime registrar, August 2022
- Dr. Rob Thomas replaced Dr. Michael Morrow as chair of math and sciences division, August 2022
- Mr. Randy Johnson hired as director of student success, August 2022
- Mr. Troy Shirley hired as controller, September 2022
- Dr. Michelle Anderson replaced Dr. Robert Thomas as chair of math and sciences division January 2023
- Ms. Tricia Fiscus became fulltime vice chancellor of administration, finance and student affairs, February 2023

Program Changes since 2022

- Name change from Division of Health, Equine and Business to Division of Professional Studies, January 2023
- Graduate certificate in Teacher Education, BoR approved January 2023
- Farm and Ranch option in A.A.S. Business degree, BoR approved January 2023
- Outdoor Industry option in A.A.S Business degree, BoR approved January 2023
- Center for Experiential Education pending approval by the BoR, March 2023
- Student Wellness Center pending approval by BoR, May 2023