



SUBMITTED TO THE NORTHWEST COMMISSION ON
COLLEGES AND UNIVERSITIES **SEPTEMBER 16, 2019**

YEAR ONE MISSION AND CORE THEMES SELF-EVALUATION REPORT

THE UNIVERSITY *of* MONTANA WESTERN

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Institutional Overview

The federal Enabling Act of 1889 established Montana, Washington, North Dakota and South Dakota as states and included a provision to set aside federal lands to establish and maintain schools of higher learning. In Montana, 100,000 acres were set aside to be managed by the state in support of normal schools (teacher's colleges). Montana's first state normal school was legislatively authorized in 1893 to offer two-year degrees in Dillon. The State Board of Education approved conferring a bachelor's degree in 1931. In 1932, the State Normal College received accreditation from the Northwest Commission on Colleges and Universities (NWCCU). Additional bachelor and masters degrees in education were approved in 1954 and four-year liberal arts degrees were approved in the 1970s. After a major restructuring of the Montana University System in 1987, the institution was administratively merged with the University of Montana in Missoula as an affiliate campus. Graduate programming in Dillon was terminated as part of the merger with the University of Montana. While over its history the institution has operated under numerous names, since 2001 it has officially been recognized as The University of Montana Western (UMW or Montana Western).

Today, Montana Western is recognized as a small, comprehensive, four-year, regional university offering certificates, associate, and baccalaureate degrees in education, business, and the liberal arts and sciences. Unduplicated headcount for the 2019 academic year was 1,699. The fall 2018 census headcount and FTE were 1,369 and 1,309, respectively; 78% of students were full-time; 64% identify as female; 80% of students identify as White and no other ethnic group constituted more than 4% of the student population; 75% of students are under the age of 24.



The campus is located in Dillon, which is the county seat and largest town in Beaverhead County. Geographically, Beaverhead is the largest county in Montana, covering an area nearly as large as the combined areas of Rhode Island and Connecticut. The county has a population of 9,341 (1.7 people per square mile), as reported by the U.S. Census. The 2010 population of Dillon was 4,134, as reported by the Montana Department of Commerce. UMW largely serves a rural population of in-state students—as 76% come from Montana counties, and 24% from out-of-state.

UMW is unique among small, public four-year universities. It formally operates on the semester system, but it is the only public university in the United States that utilizes a form of immersion scheduling, called *Experience One*, to facilitate greater collaborative and experiential learning. Experience One is a block-scheduling model, adopted on campus in 2005, that promotes the University's experiential teaching philosophy and intentionally facilitates the creation of authentic practice and learning within a student's chosen academic field. On-campus students enroll in four 4-credit courses each semester, but they take one course at a time, with each course meeting three hours per day for 18 days. This format accommodates many learning strategies that emphasize high impact practices (HIP) including classroom-based problem solving, collaborative projects, field trips, research collaboration, peer tutoring, service learning, and other day-long experiences because there are no competing courses. Prior to UMW's adoption of Experience One in 2005, only students at private liberal arts institutions (e.g., Colorado College and Cornell College) could benefit from this form of immersion scheduling.

Experience One offers students a remarkable educational experience, which has proven to enhance student learning, success, retention, and persistence. Since Experience One's inception in fall 2005, headcount has increased 22% and full-time equivalency (FTE) has increased nearly 25%. Overall graduation rates have increased from 26% to 45%. Among Montana Western's increases in student success, based on Experience One, perhaps most impressive is the fact that this model greatly supports students who typically struggle to complete a college education. One example of high achievement of students in this population is highlighted through UMW's TRIO program: Students involved in the TRIO program achieved a greater than 85% persistence rate and a six-year graduation rate of 56%. Additionally, Montana Western continues to be acknowledged and highly ranked in national surveys for educational value, affordability, student success, and growth. In the past year, *Money Magazine* ranked UMW among the "Best Colleges in America" based on educational quality, affordability and alumni financial success. *U.S. News and World Report* ranked UMW 8th in Best Regional Colleges, 4th in Top Public Schools, 5th in Best Value Schools, and 6th in Best Colleges for Veterans. *The Chronicle of Higher Education* ranked UMW among the fastest growing colleges in the country. These examples of student success and national rankings illustrate the high achievement resulting from the University's focus on undergraduate education and the unique teaching philosophy associated with Experience One.

Montana Western provides an array of student services, including residence life programming, food services, student clubs and organizations, advising, disability services, counseling, wellness, athletic programs, cultural events, tutoring, financial aid, TRIO Student Support Services, and work study opportunities.

The university is led by Chancellor Beth Weatherby, Provost and Vice Chancellor for Academic Affairs and Student Affairs Deborah Hedeon, and Vice Chancellor for Administration and Finance Mike Reid.

Preface

The following progress report is submitted on behalf of The University of Montana Western and has been written in response to the NWCCU Year Self-Evaluation Report guidelines. This preface provides an update of institutional changes since 2018 and a response to topics requested by the Commission. The remainder of the report addresses eligibility requirements, provides a thorough self-evaluation of Montana Western's mission and core themes relative to NWCCU Standards 1.A and 1.B, and concludes with a definition of mission fulfillment grounded in the institution's purpose, characteristics, and expectations.

Institutional Changes since the Last Report

Montana Western's Year Seven Self-Evaluation Report was submitted to the NWCCU in March 2018. Numerous personnel and organizational changes have occurred since that time and are summarized below.

Personnel Changes

The following administrative personnel changes have occurred since spring 2018.

- Matt Raffety became director of university communications, June 2018
- Justin Mason became director of eLearning and academic technology, July 2018
- Michael Reid became vice chancellor of administration and finance, July 2018
- Estee Aiken became division chair of education, August 2018
- Cecil Jones became division chair of business, technology, equine studies and health and human performance, August 2018
- Brent McCabe became division chair of humanities and social sciences, August 2018
- Eric Wright became division chair of mathematics and natural sciences, August 2018
- Anne Kish became director of the Lucy Carson Library, July 2019

Governance and Planning

The following organizational changes have occurred since spring 2018.

- New four-division-chair structure approved by Board of Regents, spring 2018
- New six-year strategic planning process initiated, spring 2019
- Existing five-year strategic plan, Experience the Difference, extended for one year, AY19-20

Response to Topics Previously Requested by the Commission

The Commission Action Letter, dated July 24, 2018, requires Montana Western to address Recommendations 1 and 2 of the Spring 2018 Year Seven Peer-Evaluation Report as an addendum to this report. Each recommendation is provided below along with the referenced NWCCU standard, peer evaluators' concern, and Montana Western's response. Essential elements of each recommendation (e.g., definition of mission fulfillment and meaningful, assessable, and verifiable indicators of achievement) will be thoroughly addressed under the Mission, Core Themes and Expectations section of this report.

Recommendation 1

In order to make judgements about mission fulfillment, there needs to be a clear definition of mission fulfillment, as well as a clearly outlined method for determining the extent to which the mission has been achieved. The Evaluation Committee recommends that as the institution maintains or changes its mission moving forward, that it clearly defines mission fulfillment, and that it articulates institutional accomplishments or outcomes that represent an acceptable threshold or extent of mission fulfillment (1.A.2).

Standard 1.A.2 - The institution defines mission fulfillment in the context of its purpose, characteristics, and expectations. Guided by that definition, it articulates institutional accomplishments or outcomes that represent an acceptable threshold or extent of mission fulfillment.

Evaluators' Concern – The report does not clearly articulate a definition for mission fulfillment that is comprehensible to the Evaluation Committee. The complex relationship between the Core Themes, the Strategic Plan and the Tactical Document makes it difficult to understand how these various elements articulate institutional accomplishments or outcomes that represent an acceptable threshold or extent of mission fulfillment.

Montana Western acknowledges the Evaluation Committee's concern and recommendation regarding our need to more clearly define mission fulfillment. The relationship between the existing strategic plan priorities and goals, core themes and their objectives and indicators, and the tactical document provided direction for the campus, but these did not articulate a clear definition of what constitutes mission fulfillment.

Montana Western is currently engaged in a new strategic planning process that includes a review of the existing mission. It is unlikely that the university's core mission will change or that the mission statement will be significantly modified as a result of this strategic planning process. However, the process will engage stakeholders in conversations to more clearly define mission fulfillment in the context of the university's purpose, characteristics, and expectations. The core theme objectives and indicators presented in this report should provide a framework for establishing acceptable thresholds for those various parameters that would serve as indicators of our degree of mission fulfillment relative to the university's purpose, characteristics, and expectations.

Recommendation 2

Based on the self-study and interviews with the institution's community, greater clarity is needed regarding the use of indicators to inform the ongoing evaluation of the institution's accomplishment of its core themes and the use of that evaluation for improvement. The Evaluation Committee recommends that as the institution maintains or changes its core themes and objectives, moving forward, it identifies meaningful, assessable, and verifiable indicators of achievement that form the basis for evaluating accomplishment of the objectives of its core themes and the institution regularly review its assessment processes to ensure they are authentic achievements and yield meaningful results that lead to improvement (1.B.2).

Standard 1.B.2 - The institution establishes objectives for each of its core themes and identifies meaningful, assessable, and verifiable indicators of achievement that form the basis for evaluating accomplishment of the objectives of its core themes.

Evaluators' Concern – It is not clear how the indicators are meaningful, assessable, and verifiable and form the basis for evaluating accomplishments of core theme objectives.

Montana Western acknowledges the Evaluation Committee's concern and recommendation regarding identification of meaningful, assessable and verifiable indicators of achievement that form the basis for evaluating accomplishments of core theme objectives. Montana Western further acknowledges the Evaluation Committee's concerns regarding regular review of assessment processes to ensure they are authentic achievements which yield meaningful results that lead to improvement. In addressing Recommendation 2, Montana Western is focused on using standard, higher education metrics to assess our engagement in high impact practices, student success, and institutional efficiency. The use of standardized metrics and survey instruments should yield meaningful, assessable and verifiable data which may be used to drive strategic initiatives, thus leading to improvements.

Mission, Core Themes, and Expectations

Executive Summary of Eligibility Requirements 2 and 3

The NWCCU requires accredited institutions to demonstrate they are authorized to operate and award degrees by an appropriate governmental organization, agency or governing board. The NWCCU further requires accredited institutions to operate with an educational mission and core themes that are consistent with its legal authorization and that are approved by the governing body.

Authority

The University of Montana Western is authorized to operate and award degrees as a higher education institution in the Montana University System (MUS) by the Montana Board of Regents (BoR). BoR Policy [219.1](#) (adopted May 2017) recognizes the unique mission of Montana Western and classifies it as a Regional Comprehensive University offering certificate-, associate- and baccalaureate-level academic and professional programs, as well as, contributing to the economic development, social and cultural enhancement, and civic engagement within the region. Regional Comprehensive Universities may also offer select graduate-level programs and conduct basic and applied research. Admissions policies at regional comprehensive universities define minimum levels of preparation that match the academic focus of the institution. The BoR's institutional mission parameters guide Montana Western and help define mission fulfillment.

BoR Policy [320.2](#) requires Montana Western to maintain accreditation by the Northwest Commission on Colleges and Universities. Montana Western has been NWCCU accredited since 1932.

Mission and Core Themes

In accordance with the NWCCU eligibility requirements, Montana Western's mission and core themes, presented herein, are consistent with its legal authorization and designation as a Regional Comprehensive University. Montana Western's purpose is to serve the educational interests of its students, to offer quality programs that lead to recognizable degrees, and to devote all, or substantially all, of its resources to directly or indirectly supporting its educational mission and core themes.

Standard 1.A Mission



Mission Statement

BoR Policy 219 requires review of campus mission statements every three years. Montana Western's mission statement was officially approved in November 2014 and reviewed without modification in March 2017. The current mission statement is:

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

Interpretation of Mission Fulfillment

Montana Western's mission statement and its classification as a regional comprehensive university create the framework for the selection of relevant, measurable parameters that will help gauge the degree to which the institution is fulfilling its mission. The institution's interpretation and assessment of mission fulfillment must be directly tied to its purpose, characteristics, and expectations.

The institution's purpose is to provide high quality undergraduate education to students. Montana Western is recognized as one of the three, small, regional, comprehensive universities in the Montana University System, which is governed by the Montana Board of Regents. With Montana Western's characterization as a regional comprehensive university comes the expectation of its productivity in

certificate-, associate- and baccalaureate-level academic and professional programs, and its contributions to economic development, social and cultural enhancement, and civic engagement in southwest Montana; as well as maintaining operational efficiency. Montana Western goes even further in distinguishing itself and fulfilling its mission by maintaining core commitments to academic excellence, experiential education, student success and completion, and sustainability.

The university has developed core themes and has selected metrics to measure progress in those core areas, which allows for ongoing evaluation of the institution's effectiveness and efficiency in addressing its core commitments. Although the selected metrics should not be regarded as the sole measures of institutional success, they do serve as rational indicators of assessable parameters that signal meaningful progress toward mission fulfillment. The selected metrics are also verifiable using standard definitions, formulas and data sources.

Acceptable Threshold, Extent, or Degree of Mission Fulfillment

Progress toward meeting the core-theme objectives will be measured using standard indicator metrics, which have been benchmarked and which will be tracked, analyzed, and reported as part of regular planning cycles, assessments, and budgeting processes. It is understood that all targets may not be fully met, but indicators of positive progress toward a target will need to be achieved in order to be deemed acceptable. Except where indicated, static performance or the decline in an indicator metric will be regarded as unacceptable and will trigger an institutional response.

While Montana Western does value the numerical measures of its achievement of the core-theme objectives as reflective of its mission fulfillment; it also recognizes that other measures of institutional success do exist that are not easily quantified. The institution and its programs will continue to engage in a variety of assessment activities to evaluate student learning outcomes, academic integrity, co-curricular programming, workforce needs, civic engagement, etc. There is no single, definitive assessment strategy or definition of institutional success. A variety of direct, indirect, curricular, co-curricular, programmatic, and standardized assessments will be used to monitor the degree and extent of Montana Western's mission fulfillment.

Standard 1.B Core Themes

Montana Western developed three core themes in 2011, which were reaffirmed by the BoR in 2014 and in 2017. These three core themes are:

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.

The three core themes emphasize the university's academic, student-centered and administrative purposes; they individually manifest elements of the mission; and they collectively encompass the mission. There is some degree of overlap among the themes, and each core theme emphasizes two objectives: Core Theme One emphasizes undergraduate education and experiential learning, Core Theme Two emphasizes student success and specifically student completion of degrees, and Core Theme Three emphasizes campus efficiency and stewardship of resources. A description of each core theme, its objectives, and assessable indicators are presented in the following sections. A three-year goal (2022) to reach a target metric is also presented for each indicator.

Core Theme One – Continuously Improve Undergraduate Education and Experiential Learning

Description

Montana Western's primary purpose is to provide a high-quality undergraduate education to students. The institution has chosen to distinguish itself among other small, public, regional, four-year institutions by promoting experiential learning. Core Theme One objectives and indicators focus on the elements of a Montana Western student's experience that should lead to improved learning.

Objectives, Indicators, and Rationale

Core Theme One has two objectives—1.1 Improve undergraduate education and 1.2 Improve experiential learning. Indicators and targets for each objective are presented in separate tables. A rationale for each indicator follows each table. Wherever possible, Montana Western has chosen standardized and verifiable performance indicators. The origin of each indicator is referenced in the tables and explained in the rationale.

Objective 1.1: Improve undergraduate education			
Indicators	Current	3-Year Ave.	2022 Target
Student-to-faculty Ratio (IPEDS)	17:1	18:1	18:1
Enrolled in remediation and completed gateway within two years of initial enrollment (CCM)			
<i>Math Remediation</i>	50%	53%	54%
<i>Writing Remediation</i>	92%	93%	90%
Percentage of faculty completing professional development	21%	19%	21%
<i>Note.</i> Integrated Postsecondary Education Data System (IPEDS) and Complete College Montana (CCM) metrics.			

Student-to-faculty ratio

Montana Western facilitates quality teaching and learning by promoting a low student-to-faculty ratio. The faculty-to-student ratio is a standard Integrated Postsecondary Education Data System (IPEDS) metric computed on the basis of student full-time equivalents (FTE) versus faculty FTE. This indicator is assessable and meaningful as a parameter that should correlate to Montana Western's core goal of supporting and sustaining a high quality teaching and learning environment. Course enrollment caps help to keep this ratio low, which promotes greater student-instructor interaction and higher student engagement, factors that are not easily measured, but are nevertheless important aspects of a productive and supportive learning environment.

Remediation to gateway within two years of enrollment

Complete College America (CCA) identifies completion of remediation-to-gateway mathematics and writing courses within the first two years of college as a proven student success strategy. The quicker students demonstrate college-level proficiency and begin making progress toward a degree, the higher their chances are for persisting through graduation. Montana Western maintains some of the highest remediation-to-gateway mathematics and writing success rates in the Montana University System ([MUS Data & Reports](#)). These indicators are assessable and meaningful in demonstrating Montana Western's progress in the promotion of student success, improving persistence, and reducing time-to-degree in undergraduate programs.

Faculty professional development

The support of faculty development is an ongoing concern for improving undergraduate education. Professional development activities for tenured and tenure-track faculty are tracked by the Provost from data provided by the Professional Development Committee, in terms of the number of faculty members who were funded by that committee. The target for future funding of Faculty Development is based on recent trends and expectations for faculty to make meaningful efforts toward scholarly achievement in their fields. This metric is assessable and meaningful to the degree that scholarly achievement and continued involvement in one's professional discipline translates to the individual becoming a higher quality instructor.

Objective 1.2: Improve experiential learning			
Indicators	Current	3-Year Ave.	2022 Target
Students completing at least two documented high impact practices prior to completion (NSSE)	74%	NA	80%
Categorization of participation in high impact practices prior to completion (NSSE)			
<i>Travel/Study Abroad</i>	13%	NA	20%
<i>Internships/Student Teaching</i>	67%	NA	70%
<i>Undergraduate Research</i>	22%	NA	25%
<i>Service Learning</i>	27%	NA	30%
<i>Cumulating Senior Experience</i>	42%	NA	45%
<i>Freshman Experience*</i>	NA	NA	100%
Average Class Size	15	16	17
<i>Campus Based Courses</i>	15	17	18
<i>Online/Distance Education</i>	15	13	15
<i>Note.</i> 2018 National Survey for Student Engagement (NSSE) metrics. Not available (NA). <i>* UMW does not have a Freshman Experience program. The Freshman Experience metric will be developed during the new strategic planning process.</i>			

High impact practices

Montana Western utilizes Experience One to facilitate experiential teaching and learning. Experience One classes meet for three hours daily over a 3.5-week period. The longer class periods and intensive instructional schedule allow students to pursue their studies with singular focus and to engage in high impact practices (HIPs). For the past three years, the university has been active in a statewide initiative called *Taking Student Success to Scale* (TS3), which is funded by the National Association of System Heads (NASH). The TS3 project goal is to scale HIPs across the curriculum. The National Survey for Student Engagement (NSSE) provides participation rates for HIPs. In 2018, 93% of Montana Western seniors reported participation in at least one HIP; 74% reported participation in two or more HIPs. The university's goal is to achieve 80% of seniors reporting participation in two or more HIPs. As the university formally scales HIPs across the curriculum and formalizes its new strategic plan, it will establish target participation rates for individual HIPs and begin assessing the quality elements of HIP experiences. The university views student participation in HIPs as a verifiable and meaningful indicator of student engagement in experiential learning activities.

Class size

Montana Western facilitates quality teaching and learning by promoting faculty-student and student-student interactions. Class sizes are small to ensure higher levels of student engagement and faculty mentorship. Campus-based class enrollments are capped at 25 students, online classes are capped at 20 students. The average class size is currently 15, while the three-year average is 16. Montana Western has established different average class-size targets for campus based (18) and online/distance (15) courses. The indicator targets are assessable and meaningful for promoting faculty-student and student-student interactions and for engaging students in HIPs and experiential activities.

Core Theme Two – Maximize Campus-wide Support for Student Success and Completion

Description

Students are the central focus of Montana Western’s mission, purpose, and character. Successful students correlate with a successful institution. Core Theme Two objectives and indicators focus on creating a student-ready environment that facilitates the timely program completion and graduation of an increasingly larger percentage of our enrollees.

Objectives, Indicators, and Rationale

Core Theme Two has two objectives—2.1 Maximize campus-wide support for student success and 2.2 Maximize campus-wide support for student completion. Indicators and targets for each objective are presented in separate tables. A rationale for each indicator follows each table. Wherever possible, Montana Western has chosen standardized and verifiable performance indicators. The origin of each indicator is referenced in the tables and rationale.

Objective 2.1: Maximize campus-wide support for student success			
Indicators	Current	3-Year Ave.	2022 Target
First-to-second year, first-time student, retention rate (Campus)	70%	69%	75%
<i>Associate seeking</i>	62%	58%	64%
<i>Bachelor seeking</i>	76%	74%	77%
First-time students enrolling for 15+ credits (CCA)	93%	92%	92%
Student Loan Default Rate (NSLDS) – FY15 most recent available data	8.1%	9.9%	< 10%
Participation in the Paw Prints program – % of campus population accumulating more than 5,000 points	47%	25%	65%
<i>Note.</i> Performance Funding (PF), Complete College America (CCA), and National Student Loan Data System metrics.			

First-to-second year, first-time student, retention rates

Eight percent of Montana Western’s state budget allocation is performance based. Student retention is one of three MUS performance metrics established for regional comprehensive universities. The MUS performance metric tracks student retention within all MUS campuses. The retention rates listed in the table above strictly measure student retention on-campus. Montana Western’s retention rates are currently higher than average for four-year regional campuses in Montana; however, the goal is to improve student retention and reach an overall target rate of 75% by 2022. This indicator is assessable and meaningful in promoting on-time degree completion and student success.

First-time students enrolling for 15+ credits

Fifteen to Finish is a CCA momentum strategy to promote on-time graduation and reduce student debt. Ninety-two percent of Montana Western’s first-time freshmen currently enroll in 15+ credits per semester. The high percentage is a function of Experience One and freshman advising protocols.

Montana Western's target goal is to have at least 92% of first-time freshmen enroll in 15+ credits each semester. In the future, the campus plans to expand the indicator to include all students, not just freshmen. This indicator is assessable and meaningful in promoting on-time degree completion, reducing college costs, and maximizing student financial resources.

Student-Loan Default Rate

In recent years, the student-loan default rate—reported by the National Student Loan Data System (NSLDS)—has become an important metric for institutions receiving federal Title IV funds. Institutions with high student loan default rates may be subject to a federal audit (if >25%), may be ineligible to offer direct student loans (if between 30% and 39%), and may lose all Title IV eligibility (if >40%). Title IV eligibility is critical for ensuring student access to adequate financial resources. Montana Western's target student-loan-default-rate goal is currently less than 10%. This indicator is assessable and meaningful as evidence that Montana Western is providing access to an affordable postsecondary education to students who are being financially responsible.

Participation in Paw Prints program

It is a well-established fact that student engagement in activities beyond the classroom is a positive indicator of student commitment and retention. Paw Prints for Success is Montana Western's incentive program that rewards student participation in academic and extra-curricular activities. Since its inception in fall 2016, participation in the program has grown rapidly. Paw Prints points can be used to bid for technology prizes, scholarships, and residence hall discounts. Montana Western's target goal is to have at least 65 percent of students earning more than 5,000 points each year. This indicator is assessable and meaningful as evidence that Montana Western is placing an emphasis on encouraging various forms of student engagement, which should help contribute to student success.

Objective 2.2: Maximize campus-wide support for completion			
Indicators	Current	3-Year Ave.	2022 Target
Six-year graduation rate (Overall, IPEDS)	45%	45%	47%
<i>Bachelor Degree Seeking</i>	41%	48%	50%
Transfer-out rate (IPEDS)	26%	28%	28%
Annual undergraduate degrees awarded (PF)	463	443	450
<i>Certificate Degrees</i>	16	19	20
<i>Associate Degrees</i>	200	190	200
<i>Bachelor Degrees</i>	247	235	235
First-time student, course completion rate (CCA)	89%	91%	93%
Dual enrollment participation by annual year (PF)	123 HC 47.13 FTE	104 HC 39.83 FTE	150 HC 60 FTE
<i>Note.</i> Integrated Postsecondary Education Data System (IPEDS) metric, MUS performance-based funding (PF) metric, Complete College America (CCA) metric, unduplicated headcount (HC), and full-time equivalent (FTE).			

Six-year graduation rate

Six-year graduation rates—calculated following the Integrated Postsecondary Education Data System (IPEDS) methodology—are a standard student-success metric measuring how many first-time students complete a baccalaureate within six-years of matriculation. The average IPEDS graduation rate for four-year institutions is ~55%. Prior to adoption of Experience One, Montana Western’s six-year graduation rate was less than 30%. The target goal is to have at least 50% of first-time baccalaureate students graduate within six years. This indicator is assessable and meaningful as a measure of Montana Western's success in promoting on-time degree completion and reducing college costs.

Transfer-out rate

The transfer-out rate—calculated following the IPEDS methodology—measures the percent of students who did not complete a degree at Montana Western but who subsequently enrolled in another postsecondary institution. Transfer-out data is verified through the National Student Clearing House. Montana Western’s target goal is 28%. This parameter is an assessable and meaningful indicator that some of our non-retained students are continuing to pursue the completion of a postsecondary credential.

Annual undergraduate degrees awarded

The annual number of degrees awarded is a key MUS performance funding metric for four-year, regional institutions. Each year, MUS institutions are expected to increase annual degree production, by at least one credential, over the preceding three-year average. Montana Western has consistently met this performance metric and recognizes it as an assessable and meaningful measure of student success.

First-time student course completion rate

CCA's momentum strategies include the measure of first-time student, course completion as an important first-year benchmark of academic progress. This metric looks at the percentage of courses that first-time students actually do pass during an academic year. Currently, Montana Western’s first-time students successfully complete 89% of their courses during their first year of attendance. The target course completion goal for first-time students during their first year is 93%. This indicator is an assessable and meaningful measure of new students' credit accumulation toward a degree.

Dual enrollment participation

Dual enrollment participation is a key MUS performance funding metric for two- and four-year institutions and it is an important MUS strategy for increasing postsecondary access and momentum. Montana Western’s dual enrollment target is to reach the 150 student unduplicated headcount by 2022. This indicator is an assessable and meaningful for increasing postsecondary access, reducing time-to-degree, receiving 100% of performance funds, and promoting student success.

Core Theme Three – Foster Responsible Campus Efficiency and Stewardship of Resources

Description

Montana Western is a public institution with an implicit fiduciary responsibility to the citizenry of Montana to be efficient, effective, and productive. Core Theme Three objectives and indicators focus on responsible stewardship of state and private resources for optimal campus efficiency and performance.

Objectives, Indicators, and Rationale

Core Theme Three has two objectives—3.1 Foster responsible campus efficiency and 3.2 Foster responsible stewardship of resources. Indicators and targets for each objective are presented in separate tables. A rationale for each indicator follows each table. Wherever possible, Montana Western has chosen standardized and verifiable performance indicators. The origin of each indicator is referenced in the tables and rationale.

3.1: Foster responsible campus efficiency			
Indicator	Current	3 Year Ave.	2022 Target
State expenditures per full-time equivalent (MUS)	\$10,702	\$10,095	\$11,222
Percentage of full-time students (FTE/Headcount Ratio)	96%	96%	95%
Personnel ratio (IPEDS)	80%	79%	78%
Total donations (UMW Foundation)	\$778,003	\$898,543	\$800,000
<i>Program</i>	\$435,948	\$426,681	\$435,000
<i>Scholarship</i>	\$352,056	\$296,919	\$300,000
<i>Capital</i>	\$0	\$174,945	Varies by project each year
<i>Note.</i> Montana University System (MUS), Integrated Postsecondary Education Data System (IPEDS), and Montana Western Foundation (UMW Foundation) metrics.			

State expenditures per full-time equivalent

State expenditures per full-time equivalent (FTE) is a MUS efficiency metric. The BoR notes that Montana Western ranks as one of the most cost efficient MUS campuses based on this metric. The MUS average for AY19 was \$13,389. Montana Western's goal for AY22 is \$11,222. The target is based on a 1.6% annual increase from the current state expenditures per FTE. This indicator is assessable and meaningful in maintaining affordability and reducing college costs.

Percentage of full-time students

Percentage of full-time students is the product of full-time credit equivalents (FTE) divided by unduplicated headcount. Higher percentages indicate a larger number of students are enrolled in full-time status. Montana Western's average percentage of full-time students is between 95% and 96%. Higher percentages lead to greater campus efficiencies; however, not all students are able to attend full-time. Montana Western's target percentage of full-time students, as measured by FTE divided by

headcount, is maintaining at least 95%. This indicator is assessable and meaningful for reducing student time-to-degree and maximizing the efficient use of campus instructional and support-service funds.

Personnel expenditures

Personnel expenditures is a MUS efficiency metric which measures personnel expenditures as a percent of total current unrestricted budget expenditures. The MUS average for this metric is 80%. Montana Western's target goal is 78%, which is benchmarked against other four-year institutions in the system. This metric is an assessable and meaningful indicator of the degree to which we are controlling administrative and instructional personnel costs.

Total donations

Donations to the UMW Foundation are annually reported to the Board of Regents. The primary donation categories include programs, scholarships and capital projects. The foundation's goal is to achieve 0.5-1.0% growth in total donations each year. The total donations target for 2022 is at least \$800,000. The 2022 target indicators for programs and scholarships are assessable and meaningful for improving instructional programs, granting student scholarships, and contributing to overall campus resources.

3.2: Foster responsible stewardship of resources			
Indicators	Current	3-Year Ave.	2022 Target
Total non-resident students (Banner)	314	319	335
<i>Western Undergraduate Exchange (WUE) students</i>	254	250	262
<i>Out-of-state students</i>	60	69	73
Performance-based funding (BoR)	100%	100%	100%
Job placement (OCHE/DoL)	86%	85%	85%
Budget expenditures related to instruction and academic support (BoR)			
<i>Instruction</i>	53%	53%	50%
<i>Instruction, academic support and student services</i>	76%	76%	70%
Performance on investment (OCHE/UMW Foundation)	5.14%		4%
<i>Note.</i> Sources include Banner Student Records and Board of Regents (BoR), Office of the Commissioner of Higher Education (OCHE) and Montana Department of Labor (DoL) metrics.			

Total non-resident students

Montana Western's non-resident students represent an important human, academic, and financial resource. Non-resident students diversify the campus demographics, culture, and ethos. They also contribute a significant amount of tuition revenue to the general fund. Montana Western aims to increase Western Undergraduate Exchange (WUE) scholarship recipients by 6% and the total number of non-resident students by 3%. The total non-resident student goal is 335 students by 2022. This indicator is an assessable and meaningful measure of Montana Western's efforts to diversify the campus community and to increase tuition revenue in the general fund.

Performance-based funding

In 2015, the BoR implemented a performance funding model to allocate a percentage of general funds. The BoR established the performance funding methodology and evaluates four-year, baccalaureate

institutions on three metrics—(1) first-to-second-year retention, (2) number of degrees awarded each year, and (3) unduplicated headcount enrolled in dual enrollment courses. Each of these metrics was individually addressed under Core Themes One and Two. Montana Western's performance-based funding goal is to receive 100% of its available performance funds annually. Since the model was introduced in 2015, Montana Western has achieved 100% of available performance funds. This indicator is assessable and meaningful for ensuring that Montana Western is earning, through performance, its fair share of state resources to fulfill its mission.

Job Placement

Job placement measures the percentage of those Montana Western graduates who chose to stay in Montana after graduation and who found employment. The Office of the Commissioner of Higher Education (OCHE) is able to provide this metric to campuses through a partnership with the Montana Department of Labor. Eighty-six percent of Montana Western's AY17 graduates who stayed in Montana found employment during the first year following graduation. Montana Western's goal is for at least 85% of these Montana resident graduates to achieve job placement. This indicator is assessable and meaningful for validating the value of a Montana Western education to the state of Montana, reflecting a return on investment to Montana taxpayers, and making a significant contribution to Montana's workforce.

Budget expenditures related to instruction and academic support

The Montana BoR establishes targets for budget expenditures related to instruction and academic support--at least 50% of total expenditures should support instruction, no more than 70% of total expenditures should support instruction, academic support, and student services. Montana Western is on target with 53% of expenditures supporting instruction. The sum of instruction, academic support, and student services is slightly elevated at 76% of total expenditures. Montana Western's goal is to maintain the percentage of instructional support at 53% of the budget and to reduce the sum of instruction, academic support and student services to 70% of the total budget. These indicators are assessable and meaningful for ensuring quality instruction and allocating adequate resources for institutional support of academic programs, as compared to other expenditures, such as operation and maintenance, research, and public service.

Performance on investment

Each year the UMW Foundation reports return on investment to the MUS BoR. Currently foundation investments return 5.14% in annual interest. The investments must return a minimum of 4% each year to grow and disperse aid to students and programs. The foundation's goal is to achieve at least 4% annual growth. This indicator is assessable and meaningful for the foundation's ability to award a significant amount of scholarship funds to students, as well as helping to support university programs and initiatives.

Conclusion

Throughout this report, Montana Western has articulated a clear understanding of its mission, purpose, characteristics, and expectations. The university presented three core themes with supporting objectives, and it identified verifiable, measurable, and meaningful indicators for each of the core-theme objectives. Metrics for each indicator were bench-marked, and allow for longitudinal assessment of institutional progress toward established targets.

Montana Western interprets mission fulfillment as encompassing all aspects of its regional comprehensive university classification and its unique mission statement. It differentiates itself by maintaining small class sizes for maximal student engagement, fostering a caring campus atmosphere, focusing on student success, and promoting experiential teaching and learning through its unique "Experience One" method of course scheduling.

The metrics presented in this report collectively support institutional planning, budgeting, implementation, and assessment efforts to achieve mission fulfillment. The metrics require ongoing review and action to result in continuous improvement. These metrics do not serve as the sole measures of institutional success; however, they do serve as a baseline and they are key indicators for data-based decision making. Montana Western will continue to implement a variety of additional assessments to evaluate and improve student learning outcomes, academic integrity, co-curricular programming, workforce needs, civic engagement, and other forms of institutional excellence.