

University of Montana
Academic Program and Administrative Services Prioritization
President Sheila M. Stearns' Recommendations and Reflections
December 11, 2017 – Draft for Cabinet and Shared Governance Advice

To: The UM Campus Community and Shared Governance Leadership

Background: The rhythm of December academic endings brings us to a significant passage: the end of Phase 1 of our ambitious work to set priorities for the University of Montana. We started last winter when the year was new. I announced a prioritization initiative to Faculty Senate on February 9, 2017. Shared Governance Groups (SGGs) followed in mid-February with resolutions about approaches to the project.

The purpose of prioritization is to make good decisions, whether a campus is expanding or contracting. The University of Montana in the 2017-19 timeframe faces reduced revenues and must adjust accordingly. The question has been how to do that wisely while preserving high-priority programs and significantly reducing expenditures in other programs.

Based on SGG advice and the experience of earlier prioritization work, I asked the campus community to begin, and they did so in April. The SGGs had nominated a knowledgeable 19-member Task Force chaired by Provost Beverly Edmond to design and conduct a campus-wide prioritization process.

Consultants provided guidance, but our own leaders designed their process. The APASP Task Force tenets and values have been:

- Loyalty to our identity as an internationally recognized flagship liberal arts university.
- Empowering UM students for success in higher education.
- Agility in our professional training to meet current and future labor market demands in Montana and beyond.
- Transparency at all levels of decision-making.

Approximately 30 UM citizens participated, either as voting or *ex officio* members at such an engaged level they may remember this as the most intensive service of their careers. They requested participation from hundreds more as writers, reviewers and analysts. It has been a creative and comprehensive undertaking.

Provost Edmond urged the SGGs to design and lead the process. She, with the help of her office, provided guidance and support. The subcommittees and their chairs led the way. The leaders in this effort were:

- Metrics/Data Subcommittee, Christine Fiore, Chair
- APASP Framework Subcommittee, John DeBoer, Chair
- Criteria Subcommittee, Tom DeLuca, Chair

Scope: The Task Force decided to include all programs, academic and administrative. I supported this decision. This expanded FULL completion of the work beyond our eight-month timeline. As Dean Tom DeLuca wrote in mid-July:

[Comments from public forums] ... cautioned us to streamline the process and the total data volume used in assessing units and programs. In contrast, other comments recommended that additional metrics be added to ensure a fair and effective process. ... The Task Force is trying to find the perfect balance between being fair and thorough while reviewing over 500 [eventually 400] program and unit reports.

The Task Force focused first on programs supported by the University's current unrestricted funds (state contribution and tuition revenue). They asked all programs to submit reports, including those self-funded through auxiliary revenue (such as residence halls), designated revenue (such as athletics tickets sales) and restricted revenue (from grants or donors).

Recommendation 1: The Task Force of SGGs should consider a recommendation to President Bodnar and Provost Edmond on options for:

- Completing their work designated for Phase II to include making recommendations on non-general fund programs/services and incorporating processes learned into ongoing academic program and administrative services reviews.
- Possibly revising their charge.
- Improving integration with UM's planning, assessment and budget process.
- Connecting changes driven by APASP to the current Strategic Vision.
- Proposing a timeline for completion of all recommendations.

Recommendation 2: All programs not yet analyzed or categorized by the APASP Task Force – even if they do not require state and tuition dollars (known as the “current unrestricted” or “general fund” – should at least tentatively plan for the next stages of APASP or its successor. They should post their reports publicly through the APASP website. Vice presidents and executive officers should ensure that all programs complete APASP reports.

Results and Recommendations by Sector

Academic Affairs

Academic Affairs Category 1: Priority for Development and Growth

The executive officers and APASP Task Force desire additional time for analyzing categories 1 and 2. Nevertheless, the provost believes there is a wealth of information to propose the following for growth and development:

Recommendation 3: Invest in programs that demonstrably support retention, persistence and completion.

Recommendation 4: Invest in the Faculty Development Office.

Academic Affairs Category 2: Consider for Development and/or Modification

Recommendation 5: Integrate the Montana Museum of Art and Culture with the College of Visual and Performing Arts to create synergy with the associated missions and need for administrative support. Sharing staff support for both saves resources.

Recommendation 6: Develop coordinated administrative services throughout Academic Affairs, indeed, throughout the University. It is likely that some employees and services are isolated and duplicative.

Recommendation 7: Align all centers and institutes within the Office of the Provost with the most mission-appropriate college or school. This could create better shared staff support and mission collaboration.

Recommendation 8: Invest in UM's Global Engagement Office by building on current wide-ranging successes. Energize all efforts through collaboration. Achieve savings through cooperative efforts.

Recommendation 9: Review the structure of the Office of the Provost, with insight from the outgoing and incoming provosts. The high stakes of this office cannot be overstated. The University depends on this to be a high-functioning office for leadership on accreditation, academic array and aspirations, assessment of quality, faculty development, direction and coordination of colleges and schools and their deans, as well as forging strong connections to UM's affiliate campuses and MUS.

Recommendation 10: Relocate primary administrative support for several entities that have strong connections to academic programs, such as the PEAS Farm, the George and

Jane Dennison Theatre, the Wright Zoological Museum, and the Blackfoot Café to ensure efficiency and sufficient support.

Recommendation 11: With advice and counsel from the Montana University System and stakeholders, clarify productive connections between Missoula College and Bitterroot College. Set a deadline to accomplish this – for example, April 1, 2018.

Recommendation 12: Invest in the biological sciences across the various schools and colleges (CHS, CFC, CHPBS) and its many successful programs.

Recommendation 13: Invest in growing graduate programs unique to UM, such as the MBA and the Master's in Accountancy in the College of Business.

Recommendation 14: Invest in UM's Health and Medicine Initiative to the extent possible, if not through funds, at least through interdisciplinary efforts to break down barriers among several colleges.

Recommendation 15: Ensure sustainability of independently accredited programs and to support new professional/specialized accreditations. Specify needed resources and build into the budget.

Recommendation 16: Complete APASP analysis and categorization of additional programs to identify programs for continued or diminished investment.

Recommendation 17: Connect the Master of Public Administration program with the Baucus Institute in the School of Law. Maintain interdisciplinary connections with the political science department and look for new opportunities to connect with public health, social work, and parks, tourism and recreation management.

Recommendation 18: Merge the School of Art and the School of Media Arts within the College of Visual and Performing Arts. Review whether savings can be achieved through stronger connection between the Broadcast Media Center, School of Journalism and the College of Visual and Performing Arts.

Recommendation 19: The Women's Gender and Sexuality Studies dean and stakeholders should determine the level of resources needed to sustain the program.

Academic Affairs Categories 2/3 blended: Development, Modification and/or Substantial Modification

Recommendation 20: The Missoula College dean should consider recommendations from APASP and develop plans – which may include moratorium or discontinuation – for the future of several programs in the college through credit-requirement review and student and industry input. Many of these programs provide useful workforce tools for

students and industry, but outcomes may be achieved with less time for students and more support from industry. Programs to review:

- The Energy Technology program
- The Computer Aided Design 30-credit program (For example, can it be accomplished with fewer credits, perhaps a certificate program?)
- Three related certificate programs: Computer Support, Cyber Security and Health Information Technology Food Service Management two-year degree program (currently a separate program from Culinary Arts)
- Paralegal Studies as a two-year degree program (Reconsider the legal technology component and continue building bridges and sharing resources between the law school and the two-year program.)
- Medical Reception as a certificate program
- Surgical Technology
- Pharmacy Tech
- Entrepreneurship certificate
- Sales and Marketing certificate
- Electronics technology two-year degree program
- Recreational Power Equipment certificate

Recommendation 21, Undergraduate Programs: The dean should consider recommendations from APASP and develop plans – which may include moratorium or discontinuation – associated with the following undergraduate programs and develop plans regarding their academic home, their sustainability and interdisciplinary allies:

- Applied Science major
- Film Studies minor
- Duplicate history and political science minors
- Bioethics certificate
- Health Enhancement concentration
- Administrative Systems Management minor
- Library Media minor

Recommendation 22, Undergraduate-Graduate Restructuring Opportunities: The deans should consider recommendations from APASP and develop plans – which may include moratorium or discontinuation – for the future of the following thematic areas. In this section, I list a variety of opportunities that have emerged from studying APASP units of analysis, particularly for programs assigned to Category 2 for possible restructuring. Under a new president, a skillful provost and, soon, a new provost, APASP should be used as a catalyst for innovation and consolidation. UM must save resources and reduce expenses in academic affairs. Just as crucially, it can better define outstanding niches for its future. The following list comes from my own reflections for this essay. They are not comprehensive, but they represent reflections about UM opportunities for strength, consolidation, reduction, efficiency and investment and, in some cases, all of the above.

- A. **World Languages and Culture:** Seize the opportunity to create a comprehensive division of World Languages and Culture, as suggested by Dean Chris Comer. Components of a new division could include disciplines (not necessarily programs) such as, although not limited to, the Classics, Russian, German, French, Spanish, Latin American Studies, Irish Studies, Chinese, Japanese, Arabic, East Asian Studies, Central and Southwest Asian Studies, and South and Southeast Asian Studies. Efforts should include even stronger ties to the Maureen and Mike Mansfield Center and Global Engagement Office. One example occurs to me: Every scholar in the above areas has expertise already in the pivotal role of world religions on tectonic geopolitical trends in certain areas. In WLC, UM could demonstrably strengthen our graduates' expertise in world religions without adding additional classes, majors, minors or faculty. We must reduce costs through more strategic deployment of current faculty.
- B. **Mathematical, Statistical and Computer Sciences:** The dean should consider an opportunity to create cross-disciplinary division linkages that more connecting more intentionally applied math, data science, economics, business analytics, cyber security and "big data," to name a few. Penetrate the silos between departments and colleges. We must reduce costs through more strategic deployment of faculty.
- C. **Environment and Ecology:** Several deans should consider creating even more cross-disciplinary connections throughout the environment and ecology, programs that characterize the entire campus already, from graduate programs in forestry and conservation, English, journalism, social sciences, biological sciences, Native American Studies and Missoula College, to name just few. For example, the Ecosystem Science and Restoration program could have been qualified in Category 1 for stable or increased investment, possibly sharing faculty with other worthy programs. The goal is to increase enrollment by efficiently and effectively meeting student demand in thematic ways, while potentially employing fewer numbers of faculty. We must reduce costs through more strategic deployment of faculty.
- D. **Honors and Global Leadership:** The dean of the Davidson Honors College should propose opportunities for the University to invest in the honors program as a tool for student recruitment, retention and success, and as a laboratory for curricular innovation at UM. The dean, in consultation with the director of the Franke Global Leadership Initiative, also should explore opportunities for integration between their interdisciplinary and experiential learning programs and to capture administrative, recruiting and programmatic efficiencies.
- E. **Humanities:** Reduce individual programs in fields that cannot justify current numbers of faculty (as with another sector of the Humanities mentioned above). While maintaining selected strong individual programs, a worthy follow-up to APASP could be to build joint majors under the tutelage of UM faculty with broad-fields

expertise. For example, UM can build even stronger links among its faculty in history, political science, philosophy and literature, especially as the number of faculty in various departments decline in UM's near-term future. The number of faculty in Humanities can fluctuate without diminishing UM's commitment to the Humanities at the heart of our historic curriculum. [Personal note: I constructed my own undergraduate UM curriculum in the 1960s with most classes in history and literature, but supplemented by courses in philosophy, political science and German, as well as courses in the history of science and mathematics. My degree with so many disparate parts was never wasted. I believe it has enriched my life and provided the bedrock for my careers in the 50 years since my graduation.] We must reduce costs through more strategic deployment of faculty in all disciplines.

F. Public Health: As I read through the long list of APASP units of analysis in academic programs within UM, I am struck by the frequent intersection of interests in public health, political science, education, behavioral sciences, social work, counseling, psychology, communication studies, and health and human performance, to name a few. APASP has provided us, as a side benefit, the mandate to construct aggressive innovative programs in a rapidly changing field with worldwide demand.

G. Education: Deep in the units of analysis of APASP, I see another need for closer connections. America's public schools and our democracy desperately need our graduates. In spite of polls and ideologies that suggest the contrary, democracy and public well-being depend on universities to educate wise, well-rounded, compassionate teachers. As it is already doing, UM's education professors should make even stronger common cause with disciplines such as political science, history, psychology, business, marketing and environmental studies to inspire advocates for the distinguished profession of education. We must do this through collaboration, even as we deploy faculty across disciplines in more cost-effective ways.

The above represent just a few of my reflections sparked by faculty, deans, the provost and others from the extensive reports and analysis of the APASP Task Force. Other opportunities for innovation and savings also are embedded in the reports and subsequent comments. I encourage the provost and deans to follow each thread, even as we contract our budget in the near future. An innovative, streamlined academic future for the University of Montana is possible. APASP reports have given a springboard to emerge from a defensive crouch and to go forward through innovative restructuring.

Recommendation 23, Data and Metrics: UM's Office of Institutional Research needs additional investment. It should continue its outreach throughout campus, and with the assistance of our national consultant, to improve and standardize data collection.

Recommendation 24, Improve integration of data in planning and decision-making: One of several challenges regarding data is reflected in an observation written by John DeBoer in August in an APASP communication:

“There have been numerous questions regarding faculty who are given release time for administrative work such as chair/director/program head duties or advising. ... There is great disparity across campus for how such release time is allocated. ...”

I recommend that UM develop a faculty activity dashboard reflecting all teaching assignments, with accompanying narrative or a key to explain the primary reason for the release time and significant variations in teaching loads across colleges. For example, the obvious uses for release time relate to research commitments. The provost and the deans should review consistency, cost and best use of release time and teaching loads.

Office of Research and Creative Scholarship and the Graduate School

Recommendation 25, Graduate Programs: The deans and the graduate dean should consider recommendations from APASP and develop plans – which may include moratorium or discontinuation – regarding the sustainability and streamlining of several programs through interdisciplinary bridges, including the following:

- Ecosystems Management (It is already, de facto, in moratorium. Consider its alliance with a larger online interdisciplinary structure.)
- Pharmaceutical Sciences and Drug Design
- Parks, Tourism and Recreational Management
- Interdisciplinary Graduate Program (needs additional support)

Recommendation 26: Invest Graduate School waivers in robust degree programs to the extent possible, including recruitment of international students, and in TA/GA lines, as resources are available to increase waivers.

Recommendation 27: Decrease or restructure support for the O’Connor Center in accordance with the donor’s gift agreements, acknowledging contractual and, in fact, appreciative support for the Scott Senior Fellow Director position.

Recommendation 28: Continue support for the UM Press, contingent upon changes proposed in the vice president’s APASP response.

Office of Administration and Finance

Recommendation 29: The Vice President of Administration and Finance, after reviewing the APASP categories and comments, recommends the following, and I concur:

- a. Further investment in data infrastructure. The Data Office acknowledged challenges from across campus in generating consistent data. They invite everyone to visit the APASP Data Validation webpage to review their reports

and recommend ideas for consistent, comparable and actionable data. Beyond APASP, UM's goal is strong, clear, trustworthy data for uses across the decision-making and assessment responsibilities of the institution.

- b. Continued investment in professional development.
- c. Improve understanding of campus safety and security needs.

Regarding Category 2, Vice President Rosi Keller recommends the following, and I concur:

- a. Elevate deferred maintenance as a priority investment.
- b. Add an appropriate budget mechanism to support ongoing, consistent deferred maintenance.
- c. Invest in a maintenance management system to prioritize risk mitigation, response time and state data requests. The homegrown software now in use is antiquated.

Recommendation 30: Through some of the APASP reports and from her own analysis, the vice president also recommends the following, and I concur to the extent possible and with appropriate consultation with affected stakeholders:

- a. Invest in human resources business solutions software.
- b. Consolidate employee ADA services and Disability Services for Students.
- c. Consolidate management of surplus property under recycling.
- d. Explore shared services across campus (as also recommended by the provost in administrative areas of Academic Affairs).
- e. Consolidate and collaborate among the Adams Center, Grizzly Athletics, UM Productions, theatres and the College of Business Entertainment Management program.
- f. Consolidate ASUM's transportation program and UM's parking services.

Office of Enrollment Management and Student Affairs

Recommendation 31: Regardless of APASP category, the Admissions Office requires additional investment for marketing, mailings, social media, opening new markets, sustaining long-standing markets, and funding travel for a highly effective level of outreach. The office must justify with specificity to the president ways it has used its budget in the past two years and how it proposes to use increased investments going forward.

Recommendation 32: APASP reviews reflect uncertainty about the efficacy of some fee waivers. To maintain or increase fee waivers, Enrollment Management must continue to provide a data-informed analysis of the results from each category of fee waivers.

Recommendation 33: Several offices within Student Affairs are performing admirably, with examples such as the VETS Office, American Indian Student Services, Career Services and Disability Services for Students. The latter is identified by APASP in category 1. These general-funded services in Enrollment Management, and others as well, deserve commendation. They should continue internal APASP report updates to make their case during budget cycles to supervisors and all affected constituents.

The President's Office and Sector

APASP placed the President's Office in category 2. The president has a modest staff of 3.5 individuals, reduced in recent years, to assist the president and the expectations of the office in overseeing the mission of the University.

Recommendation 34: The University must ensure that the new president has sufficient staff and resources to succeed on behalf of the University.

The other sectors of the president's domain include:

- Information Technology
- Intercollegiate Athletics
- Integrated Communications, University Relations, and Alumni Relations
- Internal Audit
- Campus Compact
- Equal Opportunity and Affirmative Action
- Diversity Advisory Council
- Legal Counsel

Recommendation 35: The University should accept a definition of IT as a critical campus-wide service and utility, as well as an enabler for initiatives in UM's strategic vision. IT should proceed to implement the plan under the guidance of the new president, including possible restructuring. The CIO must continue campus communications to convey the competitive environment for IT employees and services. Even during times of hiring freezes, some areas such as this one will require recruitments and new hires. Information Technology should continue to refine the OneIT plan its leaders and stakeholders developed over the course of the past 10 months, in concert with end users such as faculty, students, staff and all programs. The location for IT services is less than ideal. Consolidation and change should be explored for the sake of making best use of, in some areas, fewer employees.

Recommendation 36: Intercollegiate Athletics should continue to meet the compliance standards of Division 1 NCAA membership as determined by the Montana Board of Regents. Private fundraising for scholarships and facilities, plus event attendance, continue to be primary sources of funds for ICA. General fund and student fees

revenues are smaller by percentage than for comparable schools but annually should be evaluated for sustainability.

Recommendation 37: Incoming President Bodnar and consultants will evaluate UM's communications sector, including marketing, University Relations, and Alumni Relations, as well as collaboration with admissions and enrollment management. This appears to be a fruitful area for investment, restructuring and renewed emphasis.

Recommendation 38: Executive officers should complete the exploration of the viability of Printing and Graphics Services, with the goal of honoring employees, their longtime service, the needs of the campus, the demand in the University Center for Campus Quick Copy and the deficit in the program.

Recommendation 39: Offices such as Legal, Equal Opportunity and Affirmative Action, and Internal Audit are indispensable for compliance and proactive service to the UM campus and its affiliates. All were on the cusp for investment in APASP category 1. All continue to interact with colleagues in the state and across the country to provide informed service with relatively modest resources, often to students or employees in distress. As many offices do, they use interns productively, as well as national organizational resources and webinars for training.

Recommendation 40: Campus Compact and the Office for Civic Engagement are functions housed within the President's Sector that also could fit within the provost's domain or within Student Affairs. Regardless of organizational home, which should be reexamined, these programs are largely funded through grants and other fund sources. The fact that they do not receive increases in annual budgets, with rare exceptions, reflects in no way on their contribution to service learning and civic engagement throughout the campuses of UM and beyond.

Concluding Thoughts and What's Next?

As president, I will continue to review information and recommendations I may have overlooked or that were not ready, and add them to a final version of this essay and list of recommendations.

The University will use the information from APASP to inform decisions in the forthcoming budget cycle. Deans and directors must follow-up and recommend to vice presidents savings through changes that will result in a stronger University of Montana.

The timeline for each recommendation may differ somewhat, but high-level implementation plans should be prepared by or submitted to vice presidents and the president by Thursday, January 11, 2018.

Negotiating specific timelines for each recommendation is up to the vice presidents. For the most part, they should be completed by January 31, 2018.

President Bodnar of course may revise the process into phases, or in many other ways, based on his consideration and consultation with all of you, and according to the priorities of his early weeks as our new president. Inexorably, however, the University must make preliminary budget decisions in the spring based on a reduced revenue forecast. Vice President Keller and I will go over our assumptions about UM's revenue in early January, along with Commissioner Christian and his office. Subsequently and as soon as possible, we will share with the campus as a whole.

At this time, the conclusions and data from APASP will be a significant resource for deans, directors and vice presidents in making proposing balanced budgets by sector.

APASP has highlighted many areas poised for growth and investment, as mentioned in many recommendations. Some of those investments obviously have to be held in abeyance in regard to general funds, except as priorities for private fundraising as determined by the president.

Even with all the positive information contained in APASP reports, I know that many programs will have to be reduced or discontinued for the University of Montana to operate within budget for the 2018-2020 timeframe. APASP will help with specific decisions so they are as strategic as possible and not "across the board."

Recently Professor Mary-Ann Bowman reminded Cabinet about the people behind the numbers – that we must strive to understand and assist those who worry about their future with the University. I appreciate and share her advice.

In conclusion, I would personally like to thank everyone who helped launch UM's in-depth prioritization process. While it has well-documented limitations, it has moved us forward toward improving our collective understanding of hundreds of programs. The University of Montana will be able to make better decisions in the future, but definitely not easy decisions, because they still involve fewer resources for many great people and programs. All decisions about the University's future should now be better informed than they were when we began last February.