



Joint Sub Committee On Postsecondary Education Policy and Budget

60TH Montana Legislature

Room 110 Capitol Building * P.O. Box 201711 * Helena, MT 59620-1711 * (406) 444-2986 * FAX (406) 444-3036

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Shared Policy Goals and Accountability Measures for the Montana University System

DRAFT... 2009 Biennium ...DRAFT

This shared policy goals and accountability measures document represents a merging of the following four efforts that have involved leaders from the legislature, the executive and the university system over the past several years:

- 1) Board of Regents strategic goals and objectives
- 2) PEPB performance indicators and policy goals
- 3) The Shared Leadership for a Stronger Montana Economy initiatives
- 4) The University System campus quality measures

The documentation for these four efforts is incorporated by reference into this document in order to provide important background, history and context for these shared policy goals and accountability measures, in particular the shared commitments to quality, to accessibility, to affordability, to workforce development, and to an efficient, effective postsecondary education system.

It is the intention of the PEPB to review, **update** and approve this shared document **each biennium** and renew the biennial agreement with the Montana Board of Regents so that this document may become the basis of state public policy in regard to the Montana University System.

As a statement of public policy goals for higher education in Montana, it is important that this document reflects that PEPB is committed to academic quality throughout the Montana University System such that funding a high quality postsecondary education is a critical goal of the State of Montana. It is intended that this document will provide the policy direction from which a quality postsecondary education system in Montana will be maintained.

It is the intent that PEPB will then use this document to move forward with budget initiatives for the 2011 biennium budget, and other policy recommendations during the 2009 biennium interim and into the 2009 legislative session.

Note: parenthesis after each performance measure lists the effort from which it was principally derived. E.g. "(2)" means the measure was derived principally from the PEPB indicators from the last (2007) biennium. Some performance measures are a combination of more than one effort.

Shared Goal I:

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

- Prepare students for success in life through quality higher education, as measured by
 - Postsecondary education participation rates, with particular attention to Montana residents attending MUS institutions (4)
 - Completion rates (2)
 - Retention rates (2).
- Make higher education more affordable by offering more need-based financial aid grants and scholarships, as measured by
 - ~~Reducing the gap between EFC (Expected Family Contribution) and average cost of attendance (1)~~
 - **Reducing the amount of unmet student need for financial aid as measured by:**
 - **Cost of attendance – (EFC + average aid award to eligible students) [EFC = expected family contribution]**
 - Percentage of students who receive financial aid or scholarships (1)
 - Average **total** aid/scholarship award amount (4)
 - **Average state funded aid/scholarship award amount.**
- Promote postsecondary education affordability, as measured by
 - Amount of state support as a percent of total personal income relative to peer states and historical levels (2)
 - Tuition as a percentage of median household income.
- Work collaboratively with the K-12 education system to increase high school academic preparedness, completion, and concurrent enrollment programs, as measured by
 - Increased dual enrollment and advanced placement programs **including** (1,2)
 - **Increase the number of high school students enrolling in dual credit courses accepted for both high school and college level credit**
 - **Increase the number of dual enrollment course sections offered**
 - Expanded outreach to students as to the importance and accessibility of postsecondary education and the quality of the Montana University System, including:
 - Expanded outreach to at-risk and disadvantaged students (1)
 - Expanded outreach to top academic achievers graduating from Montana high schools
 - Increased high school graduation rates (1,2,4).
 - **Decrease the percentage of recent Montana high school students requiring remedial/developmental coursework in the university system as measured by:**

- **The actual overall percentage of recent Montana high school students enrolling in remedial/developmental courses in the fall semester immediately following graduation**
- Increase postsecondary enrollment of traditional and non-traditional students through expanded outreach programs, evening/weekend programs, and 2-year programs (1).
- Improve distance and online learning by coordinating online delivery of education across the entire Montana University System **in order to facilitate** (3):
 - **Increased student enrollment growth in online courses**
 - **Increased number of online courses and degree programs offered**
 - **Increased number of workforce development degree programs and certificates offered**

Shared Goal II:

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

- Increase responsiveness to workforce development needs by expanding and developing programs in high demand fields in the state, as measured by
 - Employer satisfaction with graduates (4)
 - Degrees and certificates awarded in high-demand occupational fields (2)
 - Job placement rates (2)
 - Growth in enrollment, for certificates and degrees, in 2-year programs (2).
- Establish collaborative programs among institutions, the private sector, and the state to expand research, technology transfer, the commercialization of new technologies, and the development of our entrepreneurs, as measured by
 - Research & development receipts and expenditures (2)
 - Technology licenses with Montana businesses (1).

Shared Goal III:

Improve institutional and system efficiency and effectiveness.

- Improve the accuracy, consistency and accessibility of system data, including the continued development of a comprehensive data warehouse (1, 3).
- Deliver efficient and coordinated services, as measured by
 - Improve articulation and transferability among all 2-year and 4- year institutions, including community colleges and tribal colleges **as measured by** (2):
 - **All undergraduate courses in the Montana University System will go through the process of common course numbering**
 - **All courses deemed to be significantly similar must possess the same prefix, course number, title and credits; and directly transfer on a one-to-one basis**

- **Common course numbering will result in a transparent computerized program that demonstrates transferable courses across the university system**
- Expenditures per student relative to peer institutions and historical levels
- Percentage of expenditures in the following areas (2):
 - Instruction
 - Research
 - Public Service
 - Academic Support
 - Student Services
 - Institutional Support
 - Plant O&M
 - Scholarship and Fellowships
 - Other
- Reconstruct the budget allocation model consistent with state and system policy goals and objectives (1).

Proposed New Shared Policy Goal for PEPB Consideration *(requested at Sept. meeting)*

- **Improve faculty and staff retention as measured by:**
 - ~~**Faculty longevity rates** (note: no data source identified at this time)~~
 - ~~**Staff longevity rates** (note: not data source identified at this time)~~
 - **Comparative salary levels of MUS faculty as part of the Western Interstate Commission for Higher Education (WICHE) region (excluding California)...comparison to average salary level...**
 - **Comparative faculty/staff retirement benefits as part of the Western Interstate Commission for Higher Education region (excluding California)**

PEPB Options:

1. Link new goal to other shared policy goals (e.g. increase educational attainment of Montana students, improve access to higher education, affordability of higher education, improve institutional efficiency, etc.) and accept this (as presented or revised) and include as part of “shared policy goal” I, II, or III (select one)
 - Ask staff to continue to work on this and bring that work to next PEPB meeting
 - Do not accept new shared policy goal
2. Consider entire document, including recommended changes (underlined)
 - Approve for signature of agreement ... or ... Do not approve

AGREEMENT

WHEREAS, Article VIII, section 12, of the Montana Constitution vests in the Legislature the responsibility to ensure strict accountability of all revenue received and spent by the state, counties, cities, and towns and all other local governmental entities; and

WHEREAS, Article X, section 9, of the Montana Constitution vests in the Board of Regents of Higher Education the full power, responsibility, and authority to supervise, coordinate, manage, and control the Montana University System and to supervise and coordinate other public institutions assigned to it by law; and

WHEREAS, the Joint Subcommittee on Postsecondary Education Policy and Budget (PEPB), comprised of members representing the Montana Legislature, the Montana Board of Regents, and the Executive Branch, has identified statewide public postsecondary education policy goals and accountability measures with the input and feedback of the Montana University System;

This AGREEMENT, between the Joint Subcommittee on Postsecondary Education Policy and Budget and the Montana University System, identifies the statewide public postsecondary education policy goals and related accountability measures (see pages 1-3 above) that will be used as a policy goal setting and assessment tool for policymakers, the university system, and the public in evaluating the achievement of the policy goals; and that will be used as a guide to drive decision packages and funding mechanisms for the state funding that is appropriated to the Montana University System by the Montana State Legislature.

The parties further agree to:

- 1) The Montana University System shall prepare a Shared Policy Goals and Accountability Measures Report presenting appropriate and current data for these goals and accountability measure in an easy-to-read format.
- 2) The Shared Policy Goals and Accountability Measures Report shall be presented to the House and Senate Education Committees and the Joint Appropriations Education Subcommittee by the 10th legislative day of the 60th Legislature (2007 legislative session).
- 3) The Shared Policy Goals and Accountability Measures Report shall be posted to the Board of Regents website and the Joint Subcommittee on Postsecondary Education Policy and Budget website by January 1 each year that the update is due.

This agreement expires January 1, 2011.

Dated this ____ day of ____ 2008.

Senator Bob Hawks, Chairman
PEPB Subcommittee

Lynn Morrison-Hamilton, Chair
Montana Board of Regents

Rep. _____, Vice Chairman
PEPB Subcommittee

Sheila Stearns, Commissioner
Commissioner of Higher Education