Introduction – Carmen Roberts

Carmen Roberts opened the meeting and reviewed the agenda.

Strategic Goal 2.a – Jeri Pullum - Special Projects
(see attached)

Tom Oakberg will join CAAAC as the faculty representative.

Strategic Goal 2: Increase enrollment and retention of General Education and General Studies students to ensure sustainability.
Strategic Goal 2.a: Implement an integrated educational model to help reduce the time to graduation and increase satisfaction.

At this point the model is the 8-week scheduling model. Per Leanne Frost, General Education and General Studies students were chosen for the metrics because those students tend to have lower persistence and completion rates. There are no metrics yet to measure.
Jeri reported on the various activities that CAAAC is involved in, noting that the full strategic plan is monitored even though only one sub-goal is addressed at CPBAC each month. CAAAC has been involved in disaggregating data in order to identify equity gaps because both Perkins and NWCCU are requiring this.
**Budget FY 20/21**

**Revenue**
We budgeted for 10% decline in enrollment. Spring 21 we were one of two institutions with an increase in FYE. Total revenue is $33,568 less than our budget, but still have 3 months to make up shortfall.

**Expenditures**
At 75% through the year, we are 63.8% through budgeted expenditures. Anticipate utilizing surplus funds to cover costs of dental clinic equipment.

**State Appropriations**
75% of our total revenue comes from the state.

Ms. Roberts reviewed information provided by the Board of Regents of 1) how state appropriation is determined and 2) how that appropriation is allocated among campuses.

1) **How state appropriation is determined**
The legislature determines the lump sum amount to be allocated to the MUS system, and the Board of Regents determines how that lump sum is allocated among the MUS campuses. Each campus, then, submits Base+ information to the governor’s office.
- Base (what was received last biennium) + Present Law Adjustments (inflationary costs)
- New Proposals
- Shared Policy Goals/MOUS

This year the legislature will provide present law for the second year of the biennium, but not for the first. This will increase our base for the next biennium. However, the state will provide a two-month health plan premium holiday. HB 2 will define our allocation, potentially by the second week in May.

2) **How the lump sum is allocated among MUS campuses**
Several items are taken off the top (ex: OCHE, agencies) and the rest is divided among campuses based on Base Plus and Performance Funding. Performance funding is the portion of funding tied to various performance metrics which receive a weighted score. $15M is allocated among campuses based on the campus’ share of resident FTE.
The potential allocation for GFC is $606,283. In AY20 our major hit was in degrees/certificates awarded, which resulted in FY22 performance based funding of $241,154 of possible $606,283 (40%). Any money left on the table is returned to OCHE and it is unknown at this point how it will be spent.

**FY21/22**

**Revenue**
Snapshot today: total revenue estimate is $10,199,148
- $7,331,878 (total state support) + $2,868,270 (total tuition and other) = $10,199,148

**Expenditure Changes** include shift of cost of 1-2-Free to campus, accreditation and program site visits increase, property and liability insurance increase, 2 month health insurance premium holiday decrease. Net is increase in operating budget ($165,600) and decrease in personal services budget ($379,338)

**Shortfall as submitted is $115,518**
Strategic Planning

Campus Update
March 26, 2021
Mission

Great Falls College MSU provides high quality educational experiences supporting student success and meeting the needs of our community.
Strategic Planning 2016-2022
Monitoring and Reporting

College Assessment, Analysis and Accreditation Committee
Eleazar Ortega, Institutional Researcher and Data Analyst
Dena Wagner-Fossen, Registrar
Jeri Pullum, Special Project Coordinator
Mandy Wright, Director of Library Services, Assessment, and Teaching & Learning Center
Carmen Roberts, Director of Operations
Russell Motschenbacher, Health Sciences Division Director
Tom Oakberg, Mathematics Department Chair

Updated March 2021
Strategic planning focus for 2021

**Strategic Goal 2:** Increase enrollment and retention of General Education and General Studies students to ensure sustainability
Strategic planning focus for March

Strategic Goal 2.a

Implement an integrated educational model to help reduce the time to graduation and increase satisfaction.

Metrics:
Within five years, increase by 10% the proportion of General Education and General Studies students who graduate within 150% time.

Within two years, 75% of student survey respondents will report positive experiences on the integrated educational model survey (ability to work, focus on classes, manage homework, feeling prepared).
## Operational Plan Metrics

**Metric 1: Graduation rate for General Studies students**

<table>
<thead>
<tr>
<th>Definition</th>
<th>Fall 2014 Cohort</th>
<th>Spring 2015 Cohort</th>
<th>Fall 2016 Cohort</th>
</tr>
</thead>
<tbody>
<tr>
<td>150% Graduation Rates of New, Full-time and Part-time General Ed and General Studies degree-seeking students</td>
<td>New, full-time 17.3%</td>
<td>New, full-time 17.5%</td>
<td>New, full-time 19.7%</td>
</tr>
<tr>
<td></td>
<td>New, part-time 0%</td>
<td>New, part-time 6.7%</td>
<td>New, part-time 5.6%</td>
</tr>
</tbody>
</table>
Operational Plan Metrics

Metric 2: Student survey results
• Fall results not finalized
Committee activities

• Student survey
• Assisted with NWCCU Quality Culture Project survey
• Monitor strategic plan goal/subgoal activity and progress
• Work with director of assessment
• Accreditation report
• Disaggregating data to identify equity gaps
# Revenue

<table>
<thead>
<tr>
<th></th>
<th>Budgeted</th>
<th>Actual</th>
<th>Difference</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer Tuition</td>
<td>216,477</td>
<td>211,207</td>
<td>-5,270</td>
<td>-2.23%</td>
</tr>
<tr>
<td>Fall Tuition</td>
<td>1,134,265</td>
<td>1,100,290</td>
<td>-33,975</td>
<td>-2.99%</td>
</tr>
<tr>
<td>Spring Tuition</td>
<td>1,028,805</td>
<td>1,122,298</td>
<td>93,493</td>
<td>10.26%</td>
</tr>
<tr>
<td><strong>Total Tuition</strong></td>
<td>2,379,547</td>
<td>2,433,795</td>
<td>54,248</td>
<td>2.81%</td>
</tr>
<tr>
<td>State Allocation</td>
<td>7,713,743</td>
<td>7,713,743</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>431,393</td>
<td>343,577</td>
<td>-87,816</td>
<td>-55.45%</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>10,524,683</td>
<td>10,491,115</td>
<td>-33,568</td>
<td>0.64%</td>
</tr>
</tbody>
</table>
Expenditures

75% through the year
63.8% through budgeted expenditures

<table>
<thead>
<tr>
<th></th>
<th>Budgeted</th>
<th>Actual</th>
<th>Remaining</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Services</td>
<td>8,972,050</td>
<td>5,716,645</td>
<td>3,255,405</td>
<td>63.7%</td>
</tr>
<tr>
<td>Operating Expenses</td>
<td>1,552,633</td>
<td>1,012,077</td>
<td>540,556</td>
<td>65.2%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>10,524,683</strong></td>
<td><strong>6,728,722</strong></td>
<td><strong>3,795,961</strong></td>
<td><strong>66.8%</strong></td>
</tr>
</tbody>
</table>

As of 3/24/2021
QUESTIONS ON FY21?
State Appropriations
Allocation Process
MUS Educational Unit Funding

Questions:

#1  How is the State Appropriation for the MUS determined?

#2  How are campus allocations determined?
   (including Performance Funding procedures)
MUS Educational Unit Funding
(a.k.a Program 9 - Appropriation Distribution)

Question #1: How is the State Appropriation for the MUS determined?

➢ Legislative Appropriation: Lump Sum Funding to the MUS – since 1995

➢ Base + Present Law Adjustments
  • Statewide Fixed Costs – insurance-tort, legislative audit, ITSD
  • Personnel Costs - annualized pay plan, health insurance, merit/market, leave payouts
  • Higher Ed Specific PLA –IT maintenance, utilities, journals, compliance/safety, rent
  • New Space O&M
  • Pay Plan

➢ New Proposals –Base or OTO: examples: transferability, workforce equipment, veterans’ success, distance learning, research initiative

➢ Shared Policy Goals/MOUs
  • Tuition Freeze/CCA Metrics/Performance Funding – 2013
  • Tuition Freeze/Performance Funding Continuation – 2015
  • Efficiency Metrics, State Support per Resident Student – 2017
  • Tuition Freeze/Career & Technical Education – 2019
Question #2: How are campus allocations determined by MUS?
➢ Biennial distribution following conclusion of legislature, in conjunction with setting tuition and fees.
➢ Base Plus w/ Allocation Drivers PLUS Performance
➢ Base year minus Performance Funding ($15M per year)

➢ Base Plus: Additional funding allocated based on multiple measures/drivers
  • Present Law Adjustments
  • Pay Plan
  • Tuition Freeze Backfill (3% revenue)
  • Campus Share of Res Enrollment
  • Campus Share of base budget (cuts)
  • State Support per Resident
  • % state share
  • Total revenue per student
  • Peer comparisons

➢ Performance Funding
  • Seven-year allocation history in MUS: $15M per year since FY16 ($7.5M in FY15)
  • Incentive funding to improve Retention & Completion (Student Success)
  • Specific metrics related to Mission (Flagships = Graduate degrees and research)
    (2-year College = remedial success and dual enrollment)
  • Increased incentive associated with on under-represented at-risk student groups
    (American Indians, Veterans, Low-income, and Non-traditional students)
Performance Funding History

1. **From 1972 through 2014**: enrollment was utilized as the single metric for determining the allocation of state appropriations to campuses.

2. **FY 2015**: the MUS instituted a performance funding model.
   - 5% state appropriations allocated ($7.5M)
   - Performance based on the combination of improvement in Retention and Completions

3. **FY 2016 – Present**: MUS developed and implemented a more detailed and diverse performance model.
   - $15M of state appropriations allocated annually (approx. 7.5% of total approp.)
   - Metrics expanded and aligned with campus mission
The potential allocation for each campus is based on its share of the system’s 3-year resident student FTE average

<table>
<thead>
<tr>
<th>Campus</th>
<th>Resident FTE (FY18 to FY20 average)</th>
<th>Campus Share of Resident FTE</th>
<th>Eligible $$ Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>MSU Bozeman</td>
<td>8,740</td>
<td>36.4%</td>
<td>$5,458,834</td>
</tr>
<tr>
<td>Gallatin College</td>
<td>429</td>
<td>1.8%</td>
<td>$267,761</td>
</tr>
<tr>
<td>MSU Billings</td>
<td>2,308</td>
<td>9.6%</td>
<td>$1,441,379</td>
</tr>
<tr>
<td>City College</td>
<td>614</td>
<td>2.6%</td>
<td>$383,299</td>
</tr>
<tr>
<td>MSU Northern</td>
<td>860</td>
<td>3.6%</td>
<td>$537,059</td>
</tr>
<tr>
<td>Great Falls College</td>
<td>971</td>
<td>4.0%</td>
<td>$606,283</td>
</tr>
<tr>
<td>UM Missoula</td>
<td>5,700</td>
<td>23.7%</td>
<td>$3,560,037</td>
</tr>
<tr>
<td>Missoula College</td>
<td>939</td>
<td>3.9%</td>
<td>$586,295</td>
</tr>
<tr>
<td>MT Tech</td>
<td>1,357</td>
<td>5.6%</td>
<td>$847,383</td>
</tr>
<tr>
<td>Highlands College</td>
<td>295</td>
<td>1.2%</td>
<td>$184,050</td>
</tr>
<tr>
<td>UM Western</td>
<td>1,038</td>
<td>4.3%</td>
<td>$648,339</td>
</tr>
<tr>
<td>Helena College</td>
<td>767</td>
<td>3.2%</td>
<td>$479,280</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>24,015</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>$15,000,000</strong></td>
</tr>
</tbody>
</table>
Performance Funding Goals

1) Utilize performance funding as a strategy to help increase the percentage of the population with a higher education credential. *Increase degree production.*

2) Incentivize campuses to improve student success and attainment of outcomes. *Focus on output as well as input.*

3) Connect finances with outcomes. *Pay for what we value.*
2. Each sector (flagship, 4-yr and 2-yr) has a unique set of metrics

<table>
<thead>
<tr>
<th>METRICS</th>
<th>Flagships MSU &amp; UM</th>
<th>4-year Regional UMW, MT Tech, MSUB, MSUN</th>
<th>2-year Colleges Missoula, Great Falls, Highlands, Helena, City, Gallatin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate Degrees &amp; Certificates Awarded</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Retention Rates</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Graduate-level Degrees &amp; Certificates Awarded</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research Expenditures</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Masters-level Degrees &amp; Certificates Awarded</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dual Enrollment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Remedial Success</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Credit Accumulation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Under-represented/At-risk - Retention Rates</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Under-represented/At-risk - Degrees &amp; Certificates Awarded</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
3. Metrics are measured annually and compared to prior 3-year average. CAMPUSES compete against themselves!

4. Metric values are **weighted**.

<table>
<thead>
<tr>
<th>METRICS</th>
<th>Flagships</th>
<th>4-year Regional</th>
<th>2-year Colleges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergrad Degrees &amp; Certificates</td>
<td>30%</td>
<td>40%</td>
<td>30%</td>
</tr>
<tr>
<td>Retention Rates</td>
<td>30%</td>
<td>40%</td>
<td>30%</td>
</tr>
<tr>
<td>Graduate Degrees &amp; Certificates</td>
<td>15%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research Expenditures</td>
<td>15%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Masters Degrees &amp; Certificates</td>
<td></td>
<td>10% (MT Tech &amp; MSUB)</td>
<td></td>
</tr>
<tr>
<td>Dual Enrollment</td>
<td></td>
<td>10% (UMW &amp; MSUN)</td>
<td>10%</td>
</tr>
<tr>
<td>Remediation Success</td>
<td></td>
<td></td>
<td>10%</td>
</tr>
<tr>
<td>Credit Accumulation</td>
<td></td>
<td></td>
<td>10%</td>
</tr>
<tr>
<td><strong>Under-represented/At-risk</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retention Rates</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td># of Degrees &amp; Certificates Awarded</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>
## Performance Funding

### Great Falls College MSU

<table>
<thead>
<tr>
<th>Category</th>
<th>3-yr Average</th>
<th>Current Level</th>
<th>% Increase</th>
<th>Index Score</th>
<th>Weight</th>
<th>Weighted Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Degrees/Certificates Awarded</td>
<td>430</td>
<td>286</td>
<td>-33%</td>
<td>665</td>
<td>30%</td>
<td>200</td>
</tr>
<tr>
<td>Under-Represented/At-risk Graduates</td>
<td>352</td>
<td>234</td>
<td>-33%</td>
<td>665</td>
<td>5%</td>
<td>33</td>
</tr>
<tr>
<td>Retention Rates</td>
<td>56%</td>
<td>55%</td>
<td>-2%</td>
<td>978</td>
<td>30%</td>
<td>293</td>
</tr>
<tr>
<td>Under-Represented/At-risk Students</td>
<td>56%</td>
<td>55%</td>
<td>-2%</td>
<td>977</td>
<td>5%</td>
<td>49</td>
</tr>
<tr>
<td>Dual Enrollment</td>
<td>795</td>
<td>694</td>
<td>-13%</td>
<td>873</td>
<td>10%</td>
<td>87</td>
</tr>
<tr>
<td>Remedial Success</td>
<td>32%</td>
<td>48%</td>
<td>50%</td>
<td>1503</td>
<td>10%</td>
<td>150</td>
</tr>
<tr>
<td>Credit Accumulation</td>
<td>43%</td>
<td>44%</td>
<td>2%</td>
<td>1023</td>
<td>10%</td>
<td>102</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>915</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Growth Target: 1,010
Transitional-zone Minimum: 852
% of Eligible Funding: 40%

FY22 Performance Based Funding = $241,154 of possible $606,283
FY 2022 Operating Budget
Revenue Estimate

State Allocation
Estimated flat allocation
$365,000 PF reduction

Total State support=$7,331,878

Tuition & Other
Tuition & Fees: Flat enrollment & 3% tuition increase
Transfers: ASGFCMSU, Reserves
Donations: Respiratory Care Support
Other: Interest, misc. fees

Total Tuition & Other=$2,868,270

Total Revenue Estimate=$10,199,148
FY 2022 Operating Budget Expenditure Changes

1-2-Free
Accreditation Visit
Programmatic Accreditation Visits
Resumption of Travel?
Property & Liability Insurance Increase
Health Insurance Premium Holiday
Shortfall as submitted: $115,518