Year Seven Peer-Evaluation Report

Montana State University Billings
October 15-17, 2018

Table of Contents

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Introduction
Montana State University Billings (MSU Billings) is a public Masters University (Carnegie classification, 2006) providing undergraduate and graduate programs in the arts and sciences, business, education, health, human services and technology. In 1927, Central or Eastern Montana, Eastern Montana State Normal School was established, the fifth unit at the time of the Montana University System. The institution evolved into Eastern Montana College of Education in 1949 and into Eastern Montana College in 1965. Then, in 1994, the Montana University System restructured, and the institution was incorporated into the Montana State family of campuses and changed its name to Montana State University Billings in 1995. MSU Billings is the third largest unit of the Montana University System, which is governed through the state constitution by a seven-member Board of Regents appointed by the Governor. In 1994, the Board of Regents merged the eleven state institutions into a single system, the Montana University System (MUS). That system has two families of campuses, with Montana State University Bozeman and the University of Montana Missoula serving as the flagships for each half of the MUS. Units of the Montana State University family of campuses are located in Bozeman, Billings, Havre and Great Falls.

MSU Billings is organized into five colleges: College of Allied Health Professions, College of Arts and Sciences, College of Business, College of Education, and City College, which serves the two-year community college purpose as an embedded part of the University. The University offers seventy degree options through the five colleges, including short-term work-force training, certificates, associate's, and bachelor's degrees. Three of the colleges (Allied Health Professions, Arts and Sciences, and Education) offer master's degree programs.

Assessment of the Self-Evaluation Report and Support Materials
On October 15-17, 2018 an eight-member evaluation team representing the Northwest Commission on Colleges and Universities (NWCCU) visited MSU Billings in Billings, Montana to assess the institution's Year Seven Self-Evaluation Report. Evaluation team members arrived on campus having read the institution's self-evaluation document, and they participated in an introductory meeting where initial impressions were shared and topics for further investigation were identified. Over the next two days, evaluation team members reviewed additional supporting documents; conducted numerous individual and group interviews; and participated in several meetings with faculty, staff, students, and administrators. This report contains the findings that resulted from that intensive and thorough examination of MSU Billings.

The MSU Billings self-evaluation was well written and organized according to the sequence of accreditation standards. In some cases, neither the response nor the evidence supported the implied or stated conclusions. In many cases, more evidence was found during the evaluation team's on-site visit that supported demonstration of meeting the standards than was outlined in the self-evaluation report.

Update on Recommendations from a Previous Evaluation

The November 1, 2013, Year Three Peer Evaluation report from NWCCU included the following recommendations:

> **Recommendation 1:** While noting that MSU Billings has a widely-published mission statement and that work is progressing on the core theme indicators, evaluators did not find evidence that targets have been consistently identified for the core theme indicators. The evaluation committee recommends that MSU Billings continue to refine targets for the indicators of performance for the core themes as it evaluates the accomplishment of its core theme objectives, achievement of its strategic plan, and mission fulfillment (Standards 1.A.2 and 1.B.2).

The evaluation team found that although the University did set targets for indicators of Core Theme performance, the indicators themselves were not meaningful in evaluating the accomplishment of its objectives, achievement of its strategic plan, and mission fulfillment. Therefore, the evaluation team found that the University has not fulfilled Recommendation 1.

> **Recommendation 2:** While the evaluation team found that MSU Billings has defined policies and procedures for human resources, there are inconsistencies in the application of practices and the use of assessment information to assure sufficient staffing, clarity of job duties and responsibilities, and regular evaluation of administrators. The evaluation committee recommends that MSU Billings fully and consistently implement human resources procedures to assure that the resources and capacity are consistent with the MSU Billings mission, programs and services, and the strategic plan (Standards 2.B.1, 2.B.2).

The evaluation team found that sufficient progress has not been made on this recommendation. Job descriptions do not consistently reflect duties, responsibilities and authority of the position.

Eligibility Requirements

Consistent with documentation in its Year Seven Self-Evaluation Report, in its policies and practices, and as documented throughout this report, MSU Billings meets all NWCCU Eligibility Requirements 1 through 24.

Section One – Mission, Core Themes, and Expectations
1. A. Mission
> 1.A.1. The institution has a widely published mission statement—approved by its governing board—that articulates a purpose appropriate for an institution of higher learning, gives direction for its efforts, and derives from, and is generally understood by, its community.

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.

MSU Billings has a mission statement that is reasonably understood by its community, and was approved by the Montana Board of Regents on January 8, 2013. The institution has struggled to understand and adequately assess and define mission fulfillment in the context of its purpose, characteristics and expectations. The significant turnover in key leadership positions, and the number of interim positions the institution maintains, has made it extremely difficult for MSU Billings to follow through with articulating and understanding what mission fulfillment should look like to them. The institution articulates a number of institutional accomplishments and set a target of meeting 70% of the indicators in their core themes.

1.B. Core Themes

1.B.1. The institution identifies Core Themes that individually manifest essential elements of its mission and collectively encompass its mission.

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.

MSU Billings has identified core themes that individually manifest essential elements of its mission and collectively encompass that mission, with the addition of one core theme aimed at ensuring that necessary resources are available for mission fulfillment. For each core theme the University has established a number of objectives. In many, but not all cases, these objectives are aligned with the core theme under which it is listed. The institution also has identified indicators of achievement that can form the basis for evaluating accomplishment of core theme objectives and thus the core themes themselves. For the most part, the indicators are assessable and verifiable. However, most are not meaningful in the sense that the outcomes measured allow for evaluation of accomplishment of the core themes.

Core Theme 1: Cultivating Teaching Excellence
Core Theme 1 is clearly derived from MSU Billings' mission, specifically its first bullet (Excellent Teaching). The institution has established six objectives for this core theme. The objectives are described as *Opportunities to Achieve*. Further, tasks through which to achieve these objectives have been identified. However, the objectives do not seem to align with the core theme. Instead, the objectives generally measure inputs that can influence retention and development. While measurements related to student research and compensation may be an indirect measure of faculty satisfaction or engagement, respectively, the link between these activities and the cultivation of teaching excellence isn't clear. Finally, while increasing professional development

funds may also support teaching, this does not represent a direct measure of excellent teaching, or a measure directly aligned to its promotion.

Four indicators have been used to measure progress on Core Theme 1. All four are assessable and verifiable. However, they are not meaningful in measuring progress on teaching excellence. First, several are indicators of institutional investment, not outcomes of those investments or demonstration of teaching excellence. The last indicator, external funds per faculty, is clearly focused on research. The third indicator, professional development funds awarded to staff, seems not to relate to faculty at all. It may be that teaching excellence and faculty excellence are being conflated—the term "faculty excellence" is used in the rationale for the indicators, but it seems clear that although it is desirable that a good teacher also be a good researcher, it is not established that such a mix is causally necessary.

Further, not all objectives are measured through the indicators. Opportunity A, in particular, does not seem to be measured through any indicator. Opportunity F is not either, but it is a yes/no question, so perhaps it does not need an indicator.

Core Theme 2: Providing an Environment for Learning
Core Theme 2 is derived from the second bullet in the mission statement (Support for Individual Learning). The institution seems to view the learning environment in a broad sense, as the objectives encompass affordability, recruitment and retention, and access, as well as classroom environments. This view seems appropriate, and in fact it seems to derive from the third bullet in the mission statement (Engagement in Civic Responsibility) as well. Tasks through which to achieve the objectives have been identified.

Seven indicators have been used to measure progress on Core Theme 2. All are assessable and verifiable. Most indicators are also meaningful in that they are end-state measures of success in creating an affordable, relevant, and supportive learning environment for all students, and thus of mission fulfillment. However, they are less meaningful in the sense that they are indirect measures where more direct measures could be employed. The last indicator, the number of student credit hours awarded for internships as a percent of the total student credit hours earned, only seems meaningful regarding Opportunity A, and even there the emphasis is on affordability, not on the intrinsic value of the internship.

Most objectives seem to be reflected in the indicators as long as graduation rates and retention rates are broken down by type of student (for example, MSU Billings, City College, online). However, the total enrollment, number of international students, and number of graduate students also would be relevant indicators for this core theme.

Core Theme 3: Promoting and Engaging in Civic Responsibility
Core Theme 3 is clearly derived from institutional mission, and consists of specific objectives and tasks leading to the accomplishment of these objectives. The indicators (service learning courses,

community volunteer hours, and study abroad participation) are assessable and verifiable. For Core Theme 3, the indicators are meaningful in the sense that, if done well, they could result in desirable learning outcomes for students. However, the indicators identified consist of input data (e.g., numbers of participants) rather than outputs, or meaningful data related to actual student learning outcomes. One example of a reflection paper is referenced as part of the discussion in 4.B.2. (page 161 of the Year 7 report), but such evidence does not appear to have been collected consistently or analyzed to determine learning outcomes.

With the folding of the Office of Community Involvement into the new Center for Engaged Learning, no one is currently responsible for academic service learning courses; this responsibility is in the process of being assigned to faculty members to coordinate. Meaningful data could be collected from student experiences in these courses. Additionally, the staff in the Center for Engaged Learning have plans to collect qualitative data related to volunteer hours, but this has not yet been done. The volunteer projects in the First Year Experience course are coordinated through Career and Student Services, the entity responsible for designing and teaching the course (reportedly about half of all new students enroll). Course instructors collect student essays regarding community volunteer experiences and have analyzed this data and made curricular changes; however, this has not been reported on an institutional basis. This is the type of meaningful indicator that is needed. Additionally, the Assessment and Accreditation Committee indicated that student learning outcomes data related to Core Theme 3 (and other themes) is collected by each college. Recently, the Assessment and Accreditation Committee was given responsibility for reviewing department/college learning outcome reports. This will enable the committee to review institutional indicators in the form of inputs with student learning outcomes data to make desired changes. While various entities appear to be collecting some meaningful data about student learning outcomes related to Core Theme 3, more needs to be done to coordinate these efforts at an institutional level, particularly to determine how these sources of data demonstrate areas for improvement and level of achievement of the core theme.

Core Theme 4: Enhancing the Community
Core Theme 4 cannot easily be derived as a single element of the mission. There are five objectives related to Core Theme 4 with associated tasks to reflect demonstration of the objectives. The first four objectives are assessable and measurable with associated tasks to accomplish this. The fifth objective (E) College!Now initiative tasks do not directly or indirectly assess this initiative.

The indicators for Core Theme 4 are not meaningful indicators of this objective. The first indicator of building community partnership could be a reflection of the mission; however, neither the opportunities nor indicators demonstrate meaningfulness if there is not an assessment of how the community partnership is a benefit to MSU Billings or the community itself.

The number of MSU Billings Community Events is the second indicator for Core Theme 4, and while there are many events MSU Billings has sponsored and participated in, there is not a

measurement of how these events impact or enhance the community. Tracking of the community participants has not been demonstrated separately from total participants and does not give a meaningful indicator of community involvement or reflection of community benefits. However, the recent meeting of a Community Task Force and documented input would be the beginning of evidence of achievement in this area.

Core Theme 5: Essentials for Success
This core theme does manifest essential elements of the mission of Montana State University Billings (excellent teaching, support for individual learning). MSU Billings has identified four objectives for this core theme. Each of these objectives has meaningful, assessable, and verifiable indicators of achievement for evaluating the accomplishment of the objective.

Section Two – Resources and Capacity
2. A. Governance
2.A.1-3. Governance

> 2.A.1. The institution demonstrates an effective and widely understood system of governance with clearly defined authority, roles, and responsibilities. Its decision-making structures and processes make provision for the consideration of the views of faculty, staff, administrators, and students on matters in which they have a direct and reasonable interest.

> 2.A.2. In a multi-unit governance system, the division of authority and responsibility between the system and the institution is clearly delineated. System policies, regulations, and procedures concerning the institution are clearly defined and equitably administered.

MSU Billings has a shared governance structure that provides for input and participation by the faculty Academic Senate and its subcommittees, Staff Senate, and the Associated Students of Montana State University Billings (ASMSUB). MSU Billings is part of the Montana State University (MSU) structure of the Montana University System (MUS). The governance and control of the MUS is vested with the Board of Regents who set policy for the MUS.

> 2.A.3. The institution monitors its compliance with the Commission's Standards for Accreditation, including the impact of collective bargaining agreements, legislative actions, and external mandates.

MSU Billings monitors its compliance with the NWCCU's standards. This responsibility resides within the Office of the Provost and Vice Chancellor for Academic Affairs. The Provost participates in collective bargaining with the Faculty Association and the Montana Two-Year College Faculty Association unions.

2.A.4-8. Governing Board

        2.A.4. The institution has a functioning governing board consisting of at least five voting members, a majority of whom have no contractual, employment, or financial interest in the institution. If the institution is governed by a hierarchical structure of multiple boards, the roles, responsibilities, and authority of each board—as they relate to the institution—are clearly defined, widely communicated, and broadly understood.

        2.A.5. The board acts only as a committee of the whole; no member or subcommittee of the board acts on behalf of the board except by formal delegation of authority by the governing board as a whole.

        2.A.6. The board establishes, reviews regularly, revises as necessary, and exercises broad oversight of institutional policies, including those regarding its own organization and operation.

The MUS is governed by the Board of Regents, which consists of seven members who are representative of regional areas through the state, including a student, the Governor, Superintendent of Public Instruction, and the Commissioner of the Office of the Commissioner of Higher Education who serve in an ex-officio capacity. The Board of Regents acts only as a committee of the whole, and meetings are open to the public. There was only one Board member made available for the NWCCU evaluation team, and that Board member participated by telephone.

        2.A.7. The board selects and evaluates regularly a chief executive officer who is accountable for the operation of the institution. It delegates authority and responsibility to the CEO to implement and administer board-approved policies related to the operation of the institution.

MSU Billings is governed by the Montana Board of Regents. The Chancellor of MSU Billings serves as the chief executive officer appointed by the Montana State University President, and confirmed by the Board of Regents.

        2.A.8. The board regularly evaluates its performance to ensure its duties and responsibilities are fulfilled in an effective and efficient manner.

There is not clear evidence that the Board of Regents reviews regularly or revises as necessary its own organization. The only Board of Regents' self-evaluation that can be confirmed with an agenda and meeting minutes took place August 3, 2017. However, there is no subsequent information available to demonstrate that the Board of Regents took any action other than holding a retreat. All prior years where a self-evaluation is referenced on the website cannot be substantiated in the agenda and/or meeting materials if they are posted on the website (https://mus.edu/board/meetings/agendas-and-minutes.asp).

2.A.9-11. Leadership and Management

2.A.9. The institution has an effective system of leadership, staffed by qualified administrators, with appropriate levels of responsibility and accountability, who are charged with planning, organizing, and managing the institution and assessing its achievements and effectiveness.

2.A.10. The institution employs an appropriately qualified chief executive officer with full-time responsibility to the institution. The chief executive officer may serve as an *ex officio* member of the governing board, but may not serve as its chair.

2.A.11. The institution employs a sufficient number of qualified administrators who provide effective leadership and management for the institution's major support and operational functions and work collaboratively across institutional functions and units to foster fulfillment of the institution's mission and accomplishment of its Core Theme objectives.

MSU Billings has struggled to retain administrators. The continued transition of key leadership positions, and high number of interim positions, has made it near impossible for the institution to assess its achievement and/or effectiveness. Pages 21-24 of the report highlight the many changes and continued turnover in key positions, as well as the continued number of interim leadership positions. The challenges with turnover and retention of key leadership positions for more than two or three years have significantly contributed to MSU Billings' inability to foster fulfillment of its mission and accomplishment of its core theme objectives. While there is hope that the new Chancellor and Provost will stay, there is a high level of anxiety on campus about the turnover. The turnover was recognized and highlighted by the MSU Billings Community Taskforce, as their Pillar 1 – Leadership recommendation was to "recruit and retain stable leadership" and "quickly fill interim positions."

Policies and Procedures
2.A.12-14. Academics

2.A.12. Academic policies—including those related to teaching, service, scholarship, research, and artistic creation—are clearly communicated to students and faculty and to administrators and staff with responsibilities related to these areas.

MSU Billings' policies, as embodied in collective bargaining agreements (for faculty) and academic policies (for students), are easily accessible through the University website. General criteria related to faculty responsibilities (including teaching, research and creative activity, and service, as appropriate), are included in the collective bargaining agreements. Unit criteria, once approved through the process specified in the collective bargaining agreement, must be distributed to all department faculty within 30 days.

2.A.13. Policies regarding access to and use of library and information resources—regardless of format, location, and delivery method—are documented, published, and enforced.

Policies related to library access and use are available through the Library website. This includes on- and off-campus access, interlibrary loan, fines, and behavior while in the Library.

2.A.14. The institution develops, publishes widely, and follows an effective and clearly stated transfer-of-credit policy that maintains the integrity of its programs while facilitating efficient mobility of students between institutions in completing their educational programs.

Transfer policies and equivalencies are available through admissions and through advising (in the form of transfer guides for majors). The institution Catalog also discusses transfer policies and procedures.

2.A.15-17. Students

2.A.15. Policies and procedures regarding students' rights and responsibilities—including academic honesty, appeals, grievances, and accommodations for persons with disabilities — are clearly stated, readily available, and administered in a fair and consistent manner.

Policies and procedures regarding students' rights and responsibilities are clearly stated and readily available for students. These policies can be found in the Student Policies and Procedures Handbook. Printed copies of this document are made available to all students at the beginning of each semester through varying means of distribution. In addition the student handbook can be found at: http://www.msubillings.edu/VCSA/PDF/StudentHandbook.pdf. The Vice Chancellor for Student Services makes students aware of academic policies across campus and the Division of Student Affairs distributes all conduct related policy information. The policies and procedures, including the appeals process, is clear and administered in a consistent manner.

2.A.16. The institution adopts and adheres to admission and placement policies that guide the enrollment of students in courses and programs through an evaluation of prerequisite knowledge, skills, and abilities to assure a reasonable probability of student success at a level commensurate with the institution's expectations. Its policy regarding continuation in and termination from its educational programs—including its appeals process and readmission policy—are clearly defined, widely published, and administered in a fair and timely manner.

The admission and placement of students at the graduate level is guided through policies the university has adopted in accordance with Board of Regents policy 301.3. The graduate level admission requirements are publicly available on their website at

http://www.msubillings.edu/grad/admission.htm. The admission standards at the undergraduate level are determined by the Board of Regents which provides multiple different options for admission in alignment with MSU Billings' open enrollment status. Students who do not meet the admission criteria are admitted provisionally. Placement testing is required of all students who enter MSU Billings without prior successful completion of Math and English general education. Students can place into courses using the SAT and ACT standardized tests or through results on the Accuplacer test which is offered on campus.

2.A.17. The institution maintains and publishes policies that clearly state its relationship to co- curricular activities and the roles and responsibilities of students and the institution for those activities, including student publications and other student media, if offered.

The policies and structures relating to co-curricular activities are appropriate to ensure that that the roles and responsibilities of both the institution and students are defined. These policies can be found in Board of Regents policy 506.2, in the Student Policies and Procedures Handbook (section F) and the Associated Students of MSU Billings bylaws.

2.A.18-20. Human Resources
2.A.18. The institution maintains and publishes its human resources policies and procedures and regularly reviews them to ensure they are consistent, fair, and equitably applied to its employees and students.

Human Resource policies and procedures are published on their website at http://www.msubillings.edu/humres/policies.htm. The application of these policies is equitably applied to all employees in a fair and consistent manner. Many of the policies published have not been reviewed for ten years. These policies should be reviewed regularly and updated to reflect the review date.

2.A.19. Employees are apprised of their conditions of employment, work assignments, rights and responsibilities, and criteria and procedures for evaluation, retention, promotion, and termination.

Information for new employees regarding conditions of employment and rights and responsibilities are outlined in the Collective Bargaining Agreements (CBA) which can be found on the Human Resources website at http://www.msubillings.edu/humres/labor.htm. Information to classified employees regarding benefits, CBA's, and evaluation information is provided in an orientation meeting given by the staff in the Human Resources office. In addition, faculty attend a new faculty orientation and many receive mentors in their departments. Individual departments orient new faculty and staff on work assignments and department policies and procedures.

2.A.20. The institution ensures the security and appropriate confidentiality of human resources.

Employees' use of technology and the confidentiality of human resource records are outlined in the document 'An Employee's guide to Standards of Conduct in Montana State Government.' Human Resource and personnel information is kept confidential and in a secure manner. All users of MSU Billings systems must use a user ID and password as a unique authentication each time they log into university systems.

2.A.21-26 Institutional Integrity

2.A.21. The institution represents itself clearly, accurately, and consistently through its announcements, statements, and publications. It communicates its academic intentions, programs, and services to students and to the public and demonstrates that its academic programs can be completed in a timely fashion. It regularly reviews its publications to assure integrity in all representations about its mission, programs, and services.

2.A.22. The institution advocates, subscribes to, and exemplifies high ethical standards in managing and operating the institution, including its dealings with the public, the Commission, and external organizations, and in the fair and equitable treatment of students, faculty, administrators, staff, and other constituencies. It ensures complaints and grievances are addressed in a fair and timely manner.

MSU Billings clearly represents itself in its various publications. Its mission and values are consistently included in the University catalogs. Information is accessible and the various publications and websites seem to be updated on a regular basis. MSU Billings' standards of behavior are encompassed for the most part in relevant documents, including Collective Bargaining Agreements, documents from the State of Montana, and the Student Policies and Procedures Handbook, as are grievance procedures. The standards of behavior could be more clearly stated in the agreement with the City College faculty.

2.A.23. The institution adheres to a clearly defined policy that prohibits conflict of interest on the part of members of the governing board, administration, faculty, and staff. Even when supported by or affiliated with social, political, corporate, or religious organizations, the institution has education as its primary purpose and operates as an academic institution with appropriate autonomy. If it requires its constituencies to conform to specific codes of conduct or seeks to instill specific beliefs or world views, it gives clear prior notice of such codes and/or policies in its publications.

2.A.24. The institution maintains clearly defined policies with respect to ownership, copyright, control, compensation, and revenue derived from the creation and production of intellectual property.

MSU Billings abides by system-wide policies regarding conflict of interest, as well as state ethics policies. Forms are required for faculty engaged in activities that may present a conflict of interest. The institution adheres to the Montana Board of Regents policies on intellectual property. This includes a policy on rights pertaining to e-learning.

2.A.25. The institution accurately represents its current accreditation status and avoids speculation on future accreditation actions or status. It uses the terms "Accreditation" and "Candidacy" (and related terms) only when such status is conferred by an accrediting agency recognized by the U.S. Department of Education.

MSU Billings accurately represents its NWCCU accreditation status on its website.

2.A.26. If the institution enters into contractual agreements with external entities for products or services performed on its behalf, the scope of work for those products or services—with clearly defined roles and responsibilities—is stipulated in a written and approved agreement that contains provisions to maintain the integrity of the institution. In such cases, the institution ensures the scope of the agreement is consistent with the mission and goals of the institution, adheres to institutional policies and procedures, and complies with the Commission's Standards for Accreditation.

Policies regarding contracts are clear and accessible on the institution's website.

2.A.27- Academic Freedom

2.A.27. The institution publishes and adheres to policies, approved by its governing board, regarding academic freedom and responsibility that protect its constituencies from inappropriate internal and external influences, pressures, and harassment.

2.A.28. Within the context of its mission, core themes, and values, the institution defines and actively promotes an environment that supports independent thought in the pursuit and dissemination of knowledge. It affirms the freedom of faculty, staff, administrators, and students to share their scholarship and reasoned conclusions with others. While the institution and individuals within the institution may hold to a particular personal, social, or religious philosophy, its constituencies are intellectually free to examine thought, reason, and perspectives of truth. Moreover, they allow others the freedom to do the same.

2.A.29. Individuals with teaching responsibilities present scholarship fairly, accurately, and objectively. Derivative scholarship acknowledges the source of intellectual property, and personal views, beliefs, and opinions are identified as such.

MSU Billings meets the requirement for academic freedom. The Board of Regents' code of ethics for all state employees are published in state statutes and encompasses faculty members' rights and responsibilities with regard to academic freedom and academic integrity. This is reinforced through the Board of Regents adoption of the AAUP Statement on Academic Freedom and collective bargaining agreements with faculty on the University Campus and the City Campus. Student policies account for the protection of diversity and freedom of expression (e.g., Student Freedom of Expression). The core themes emphasize the pursuit of and dissemination of knowledge (e.g., cultivating teaching excellence and the opportunity to achieve). Standards, policies, and processes are in place for ethical research practices.

2.A.30- Finance

> 2.A.30. The institution has clearly defined policies, approved by its governing board, regarding oversight and management of financial resources—including financial planning, board approval and budgets reserves, investments, fundraising, cash management, debt management, and transfers and borrowings between funds.

MSU Billings maintains clearly defined policies and procedures for oversight and management of its financial resources. Policies are tied to specific published rules of the Montana Board of Regents acting under the authority of the Office of Higher Education. MSU Billings also falls under the procedural jurisdiction and oversight of the State Legislative Audit Division, the Montana University System (MUS), and policies that are internal to MSU and MSU Billings. Through a process of internal and independent oversight, MSU Billings is held accountable for adherence to financial policies that regard prudent financial management of, operating and capital budgets, debt management, university cash and cash reserves, transference of funds between accounts, and for the ethical fundraising activities of the Foundation bearing its name.

2. B. Human Resources
2.B.1-6.

> 2.B.1. The institution employs a sufficient number of qualified personnel to maintain its support and operations functions. Criteria, qualifications, and procedures for selection of personnel are clearly and publicly stated. Job descriptions accurately reflect duties, responsibilities, and authority of the position.

Criteria, qualifications and procedures for selection of personnel are clearly and publicly stated and published as a part of position search processes. Job descriptions are often not current and don't accurately reflect the duties, responsibilities and authority of the position being performed. Many departments have staff performing multiple different functions or tasks outside their jobs description. MSU Billings needs to review job descriptions to ensure they accurately reflect the duties, responsibilities, and authority of the jobs being performed. Further, the campus should evaluate if there is a sufficient number of qualified personnel to maintain its support operations.

2.B.2. Administrators and staff are evaluated regularly with regard to performance of work duties and responsibilities.

Administrators and staff are evaluated regularly regarding their work performance according to policy and the bargaining agreements. The Administrative Evaluation Process outlines that the Chancellor's Cabinet oversees a process where administrators are evaluated once every three years. Staff members receive a yearly evaluation.

2.B.3. The institution provides faculty, staff, administrators, and other employees with appropriate opportunities and support for professional growth and development to enhance their effectiveness in fulfilling their roles, duties, and responsibilities.

Faculty have five different opportunities for professional growth and development. The five initiatives: 1) the Creative and Research and Endeavors (CARE) program, 2) the Faculty Professional Development program, 3) the e-Learning Faculty Development Grant program, and 4) the Carl Perkins Grant Program. These opportunities provide options for faculty to enhance their effectiveness in fulfilling their roles, duties and responsibilities. Staff members receive professional development through on campus trainings, or off campus workshops and/or conferences dependent upon departmental budgets.

2.B.4. Consistent with its mission, Core Themes, programs, services, and characteristics, the institution employs appropriately qualified faculty sufficient in number to achieve its educational objectives, establish and oversee academic policies, and assure the integrity and continuity of its academic programs, wherever offered and however delivered.

MSU Billings employs appropriately qualified faculty sufficient in number to achieve its educational objectives, establish and oversee academic policies and ensure the integrity and continuity of its academic programs.

2.B.5. Faculty responsibilities and workloads are commensurate with the institution's expectations for teaching, service, scholarship, research, and/or artistic creation.

Faculty responsibilities and workloads are commensurate with the institutions expectations for teaching as the primary responsibility, and scholarly development/contribution, and service to the institution/public as secondary. The two CBA's outline the minimum load each faculty member is expected to teach and the amount of credits assigned for administrative responsibilities and service.

2.B.6. All faculty are evaluated in a regular, systematic, substantive, and collegial manner at least once within every five-year period of service. The evaluation process

specifies the timeline and criteria by which faculty are evaluated; utilizes multiple indices of effectiveness, each of which is directly related to the faculty member's roles and responsibilities, including evidence of teaching effectiveness for faculty with teaching responsibilities; contains a provision to address concerns that may emerge between regularly scheduled evaluations; and provides for administrative access to all primary evaluation data. Where areas for improvement are identified, the institution works with the faculty member to develop and implement a plan to address identified areas of concern.

MSU Billings is in compliance with this standard. All faculty members participate in an annual performance evaluation as outlined in the collective bargaining agreements.

2. C. Education Resources
2.C.1-8

2.C.1. The institution provides programs, wherever offered and however delivered, with appropriate content and rigor that are consistent with its mission; culminate in achievement of clearly identified student learning outcomes; and lead to collegiate-level degrees or certificates with designators consistent with program content in recognized fields of study.

2.C.2. The institution identifies and publishes expected course, program, and degree learning outcomes. Expected student learning outcomes for courses, wherever offered and however delivered, are provided in written form to enrolled students.

Content of academic programs at MSU Billings aligns with the institutional mission to provide a University experience through excellent teaching, individual learning support, and community enhancement. The institution has a defined process for program needs and introduction with community input, and system review. Departments develop a program request, which is then reviewed by the Academic Senate, approved by the Provost and Vice Chancellor for Academic Affairs, and the Montana University System Board of Regents (BOR). Academic degree programs are reviewed every seven years for the BOR. Many of the program outcomes are reviewed through their department and Dean, annually.

Student learning, general education, program, and course outcomes are identified and measured. MSU Billings reviews program assessment through the Assessment and Accreditation Council (AAC), which is a combined university group effort. The AAC has a broad representation of faculty and departments as well as other campus representation. The AAC reports to the Provost and Vice Chancellor of Academic Affairs. Departments are responsible for their own courses and programs. Faculty within their specific specialty area are tasked with assessing their students and courses.

There are many programs with specialized accreditation processes through outside agencies. Evidence for this process of learner outcomes documentation and review was demonstrated through the AAC, program accreditations, online education policies, college catalog, review of course syllabi, self-study assessment reports for non-accredited programs, and conversations with faculty and administrators. Upon review of some of the course syllabi, there are learner outcomes present, but a defined measurement to assess the outcomes could be better connected.

> 2.C.3. Credit and degrees, wherever offered and however delivered, are based on documented student achievement and awarded in a manner consistent with institutional policies that reflect generally accepted learning outcomes, norms, or equivalencies in higher education.

> 2.C.4. Degree programs, wherever offered and however delivered, demonstrate a coherent design with appropriate breadth, depth, sequencing of courses, and synthesis of learning. Admission and graduation requirements are clearly defined and widely published.

MSU Billings program degrees include: Certificate of Applied Science, Associate degrees, Baccalaureate degrees, and Master degrees. These certificate and degrees are designed differently to provide options for students of varied interests and needs. The programs of study learning outcomes are published in the General Bulletin (catalog) as stated in the MSU Billings self-study. Degree requirements are posted in the General Bulletin and program pages online. The sequencing and design of program courses along with learner outcomes, prerequisite requirements are appropriate and are available to the student through the catalog, program websites, and advising process.

The awarding of degrees and credits is based on the abilities of the students measured through learning outcomes and performance. MSU Billings utilizes Degree Works for evaluation of degree credit and advancement, which is an electronic degree audit system. Along with Degree Works, admission and graduation requirements appear online and in the General Bulletin. Degree programs reviewed demonstrated appropriate design and sequencing of courses to achieve successful competition of requirements for achievement of the degree. Review of the General Bulletin, institutional policies, and program degree pathways demonstrates credit and degrees are awarded in a manner consistent with institutional policies, standard practices, and equivalencies in higher education. Admission and graduation requirements appear online and in the General Bulletin.

> 2.C.5. Faculty, through well-defined structures and processes with clearly defined authority and responsibilities, exercise a major role in the design, approval, implementation, and revision of the curriculum, and have an active role in the selection

of new faculty. Faculty with teaching responsibilities take collective responsibility for fostering and assessing student achievement of clearly identified learning outcomes.

Curriculum design, approval, implementation, and revision begins with the faculty. The faculty introduces the change and curriculum design to the department or departments. Upon approval at the department level, the curriculum review is sent to the MSU Billings Curriculum Committee (or if it is a General Education change, it would go to the General Education Committee). Both the Curriculum and General Education Committees are standing Academic Senate subcommittees, therefore, approval of changes must receive a vote of the full Senate for approval. The next step in the curriculum process change is approval from the Provost and Vice Chancellor for Academic Affairs, Chancellor, President of MSU Bozeman, and then the Board of Regents.

During the process of hiring new faculty, MSU Billings faculty serve on search committees, help write and/or review position openings and announcements, and participate in the open forums/presentations. Faculty members have input into the hiring of new faculty.

> 2.C.6. Faculty with teaching responsibilities, in partnership with library and information resources personnel, ensure that the use of library and information resources is integrated into the learning process.

A library staff member serves as a contact for each academic program or department to assist teaching faculty with incorporation of library research skills, and to introduce resource guides for courses. Online tutorials from the collaboration of the library staff and faculty are available on the library website and the D2L course management system. In addition, librarians offer an active instruction program to individual classes and in stand-alone courses. These courses are offered face-to-face and online, as well as being provided to support the institution's core curriculum. Classes across the curriculum incorporate formats of library instruction and guides.

> 2.C.7. Credit for prior experiential learning, if granted, is: a) guided by approved policies and procedures; b) awarded only at the undergraduate level to enrolled students; c) limited to a maximum of 25% of the credits needed for a degree; d) awarded only for documented student achievement equivalent to expected learning achievement for courses within the institution's regular curricular offerings; and e) granted only upon the recommendation of appropriately qualified teaching faculty. Credit granted for prior experiential learning is so identified on students' transcripts and may not duplicate other credit awarded to the student in fulfillment of degree requirements. The institution makes no assurances regarding the number of credits to be awarded prior to the completion of the institution's review process.

MSU Billings both accepts and provides options for credit for experiential learning and challenge tests, such as AP credit and CLEP. For workforce training, the student could obtain MSU Billings

college credit based on certificates of completion along with American Council on Education or National Collegiate Credit Recommendation Service documentation of review. Military work related credit is assessed for earned credit based on review of military transcript. Another option to earn credit is through a Prior Learning Assessment with the submission of a portfolio based on experience. There are documented policies and procedures for the process of obtaining earned credit recognition. The policies are available in the General Bulletin and online for student review.

> 2.C.8. The final judgment in accepting transfer credit is the responsibility of the receiving institution. Transfer credit is accepted according to procedures which provide adequate safeguards to ensure high academic quality, relevance to the students' programs, and integrity of the receiving institution's degrees. In accepting transfer credit, the receiving institution ensures that the credit accepted is appropriate for its programs and comparable in nature, content, academic quality, and level to credit it offers. Where patterns of student enrollment between institutions are identified, the institution develops articulation agreements between the institutions.

There are procedures in place for transfer of credits to ensure high academic quality. Acceptance of transfer credits from Montana institutions of higher education has been directed by the Board of Regents common course number initiative. The Common Course Number Liaison at the public institutions maintains compliance with the Board of Regent's policy. For courses outside of Montana, department chairs review the credits in their designated areas for appropriate academic quality, content, and approval of transfer credits. There are policies in the General Bulletin and a transfer guide available online related to transfer credits.

2.C.9-11. Undergraduate Programs

> 2.C.9. The General Education component of undergraduate programs (if offered) demonstrates an integrated course of study that helps students develop the breadth and depth of intellect to become more effective learners and to prepare them for a productive life of work, citizenship, and personal fulfillment. Baccalaureate degree programs and transfer associate degree programs include a recognizable core of general education that represents an integration of basic knowledge and methodology of the humanities and fine arts, mathematical and natural sciences, and social sciences. Applied undergraduate degree and certificate programs of thirty (30) semester credits or forty-five (45) quarter credits in length contain a recognizable core of related instruction or general education with identified outcomes in the areas of communication, computation, and human relations that align with and support program goals or intended outcomes.

General education programs at both the associate's and baccalaureate levels comprise a recognizable core of general knowledge and methodology. Associate of Applied Science degrees, as well as Certificates of Applied Science, require coursework in communication, computation, and human relations.

2.C.10. The institution demonstrates that the General Education components of its baccalaureate degree programs (if offered) and transfer associate degree programs (if offered) have identifiable and assessable learning outcomes that are stated in relation to the institution's mission and learning outcomes for those programs.

The University clearly articulates learning outcomes for its General Education programs at both associates' and baccalaureate levels. They are communicated clearly through the appropriate catalogs.

2.C.11. The related instruction components of applied degree and certificate programs (if offered) have identifiable and assessable learning outcomes that align with and support program goals or intended outcomes. Related instruction components may be embedded within program curricula or taught in blocks of specialized instruction, but each approach must have clearly identified content and be taught or monitored by teaching faculty who are appropriately qualified in those areas.

The Associate of Applied Science and Certificate of Applied Science programs have clearly defined outcomes that are assessable for their related instruction components. Material is delivered and assessed in specialized courses.

2.C.12-15. Graduate Programs
2.C.12. Graduate programs are consistent with the institution's mission; are in keeping with the expectations of their respective disciplines and professions; and are described through nomenclature that is appropriate to the levels of graduate and professional degrees offered. They differ from undergraduate programs by requiring greater depth of study and increased demands on student intellectual or creative capacities; knowledge of the literature of the field; and ongoing student engagement in research, scholarship, creative expression, and/or appropriate high-level professional practice.

Colleges within MSU Billings have mission statements and strategic plans that derive from the MSU Billings' mission, and align with the FutureU Strategic Plan. Graduate programs are guided by college mission statements. The MSU Billings' Mission, Vision, and Core Values emphasize the importance of being responsive to the changing needs of learners and their communities. The description of the Graduate School in the MSU Billings graduate catalog includes the statement "Montana State University Graduate programs and courses are more advanced and require students to take more initiative and demonstrate more independence than is the case for undergraduate programs and courses. The graduate programs are guided by the expectations of their respective disciplines and professions." All graduate degree programs, certificates, and new courses are reviewed by the Graduate Committee, which then makes recommendations to the Academic Senate. All graduate programs have identified specific and measurable outcomes that are indicated in the graduate catalog.

2.C.13. Graduate admission retention policies ensure that student qualifications and expectations are compatible with the institution's mission and the program's requirements. Transfer of credit is evaluated according to clearly defined policies by faculty with a major commitment to graduate education or by a representative body of faculty responsible for the degree program at the receiving institution.

Graduate admission and retention policies at MSU Billings ensure that student qualifications and expectations are compatible with the institution's mission and program requirements. The requirements of each of MSU Billings graduate programs can be readily found on the campus website. Faculty in each graduate program evaluate prospective student's qualifications.

Credits can be transferred into a graduate program if they are approved by the program director or advisor. Each graduate program has limits on the number and type of transfer credits accepted. Transfer credits must be equivalent to courses in the student's graduate program at MSU Billings, as determined by the program into which the student desires to transfer credits. The College of Allied Health Professions, the College of Arts and Sciences, and the College of Education each maintain separate policies on transferring graduate credit, all of which are published on pages 46 and 47 in the Graduate Catalog.

2.C.14. Graduate credit may be granted for internships, field experiences, and clinical practices that are an integral part of the graduate degree program. Credit toward graduate degrees may not be granted for experiential learning that occurred prior to matriculation into the graduate degree program. Unless the institution structures the graduate learning experience, monitors that learning, and assesses learning achievements, graduate credit is not granted for learning experiences external to the students' formal graduate programs.

MSU Billings does not award graduate credit for experiential learning that occurred prior to matriculation. Graduate credit can be awarded for internships, field experiences, and clinical practices that are structured, monitored, supervised, and included within the formal graduate program. A maximum of six semester credits of independent study may be used on an approved plan of study. A Graduate Student Independent Study Agreement must be approved by the course instructor, advisor, department chair, and dean of the college before an independent study can be included in a student's graduate program.

2.C.15. Graduate programs intended to prepare students for research, professional practice, scholarship, or artistic creation are characterized by a high level of expertise, originality, and critical analysis. Programs intended to prepare students for artistic creation are directed toward developing personal expressions of original concepts, interpretations, imagination, thoughts, or feelings. Graduate programs intended to prepare students for research or scholarship are directed toward advancing the frontiers of knowledge by constructing and/or revising theories and creating or applying

knowledge. Graduate programs intended to prepare students for professional practice are directed toward developing high levels of knowledge and performance skills directly related to effective practice within the profession.

MSU Billings' eight master's degrees and four graduate certificate programs are intended to prepare students for research and/or professional practice. Program Learning Objectives (PLOs) are fully developed and published for each graduate program responsible for preparing students for professional practice. The PLOs focus on the higher level of knowledge and performance of skills specific to the professional discipline. The development and measurement of the program goals and objectives are overseen by faculty within individual programs. In programs at MSU Billings accredited by an outside agency, such as the Master of Science in Athletic Training, the PLOs have been established as part of the criteria for accreditation and include the knowledge and skills necessary for licensure in the field.

2.C.16-19. Credit and Non-Credit

2.C.16. Credit and non-credit continuing education programs and other special programs are compatible with the institution's mission and goals.

2.C.17. The institution maintains direct and sole responsibility for the academic quality of all aspects of its continuing education and special learning programs and courses. Continuing education and/or special learning activities, programs, or courses offered for academic credit are approved by the appropriate institutional body, monitored through established procedures with clearly defined roles and responsibilities, and assessed with regard to student achievement. Faculty representing the disciplines and fields of work are appropriately involved in the planning and evaluation of the institution's continuing education and special learning activities.

2.C.18. The granting of credit Continuing Education Units (CEUs) for continuing education courses and special learning activities is: a) guided by generally accepted norms; b) based on institutional mission and policy; c) consistent across the institution, wherever offered and however delivered; d) appropriate to the objectives of the course; and e) determined by student achievement of identified learning outcomes.

2.C.19. The institution maintains records which describe the number of courses and nature of learning provided through non-credit instruction.

Continuing education and special learning activities, for credit and not for credit, support MSU Billings' mission and goals through programs that support regional needs for academic, professional, and other educational needs through a mix of face-to-face, online, and hybrid courses. Extended Campus staff, collaborating where appropriate with MSU Billings academic departments, design, offer, and evaluate courses intended to meet community and regional training and educational needs as well as address community outreach goals. MSU Billings retains

sole responsibility and authority over learning outcomes, assessment, and quality of courses. Appropriate student support services are provided through campus service providers. The granting of credit and continuing education units complies with nationally recognized standards as well as established MSU Billings practices in compliance with MSU Billings' mission, goals, and academic standards. All required records about courses are submitted to appropriate offices.

2.D Student Support Resources

> 2.D.1. Consistent with the nature of its educational programs and methods of delivery, the institution creates effective learning environments with appropriate programs and services to support student learning needs.

The institution creates effective learning environments with appropriate programs and service to support student learning needs. The university offers multiple services to support students including access to tutors, learning labs and accommodations for students with disabilities.

> 2.D.2. The institution makes adequate provision for the safety and security of its students and their property at all locations where it offers programs and services. Crime statistics, campus security policies, and other disclosures required under federal and state regulations are made available in accordance with those regulations.

MSU Billings makes adequate provision for the safety and security of its students and their property at all locations where it offers programs. University police patrol both campuses and provide safety services to students, faculty and staff. The policies of the institution are easily found on the institutions' website and chronicled in way that is easy to search. Crime statistics, security policies and other federal and state regulations are appropriately made available to students on-line and when requested. Each semester a postcard is sent to students outlining how to obtain the information required by federal and state regulations.

> 2.D.3. Consistent with its mission, Core Themes, and characteristics, the institution recruits and admits students with the potential to benefit from its educational offerings. It orients students to ensure they understand the requirements related to their programs of study and receive timely, useful, and accurate information and advising about relevant academic requirements, including graduation and transfer policies.

MSU Billings is an open enrollment institution and therefore admits all applicants. They invest in orientation programs and advising/coaching program for students. Students are oriented to the campus they will be attending to assist in the transition to college and to provide information needed for student success. Students are assigned advisors throughout their time at MSU Billings who are responsible to maintain contact with the student and help them navigate their academic career. Once students declare a major, program content advising is moved from central services to a faculty member. Internship, job exploration, and career services remain assigned to

personnel in a central office. Students in online learning environments are offered phone and Web-ex advising sessions.

2.D.4. In the event of program elimination or significant change in requirements, the institution makes appropriate arrangements to ensure that students enrolled in the program have an opportunity to complete their program in a timely manner with a minimum of disruption.

Significant changes in programs and all program eliminations must go through an internal committee review process, and then a process outlined by the Office of the Commissioner of Higher Education, which requires approval of the Chancellor. Following that approval a letter of intent is sent to the President of MSU Bozeman, and is forwarded to the Board of Regents. Policy 303.4 of the Montana Board of Regents guides the program elimination process and makes sure that students enrolled in the program have an opportunity to complete their program in a timely manner with minimal disruption.

2.D.5. The institution publishes in a catalog, or provides in a manner reasonably available to students and other stakeholders, current and accurate information that includes:
a) Institutional mission and Core Themes;
b) Entrance requirements and procedures;
c) Grading policy;
d) Information on academic programs and courses, including degree and program completion requirements, expected learning outcomes, required course sequences, and projected timelines to completion based on normal student progress and the frequency of course offerings;
e) Names, titles, degrees held, and conferring institutions for administrators and full-time faculty;
f) Rules, regulations for conduct, rights, and responsibilities;
g) Tuition, fees, and other program costs;
h) Refund policies and procedures for students who withdraw from enrollment;
i) Opportunities and requirements for financial aid; and
j) Academic calendar.

The standards outlined in 2.D.5 are published in the General Bulletin, online, in brochures and/or pamphlets, and are reasonably available to students and institution stakeholders.

2.D.6. Publications describing educational programs include accurate information on:
a) National and/or state eligibility requirements for licensure or entry into an occupation or profession for which education and training are offered;
b) Descriptions of unique requirements for employment and advancement in the occupation or profession.

Publications describing educational programs provide useful information and are clear on all federal and/or state eligibility requirements for licensure or entry into the occupation, and descriptions of unique requirements for employment and advancement in the profession.

2.D.7. The institution adopts and adheres to policies and procedures regarding the secure retention of student records, including provision for reliable and retrievable backup of those records, regardless of their form. The institution publishes and follows established policies for confidentiality and release of student records.

The institution adopts and adheres to policies and procedures regarding the secure retention of student records and has appropriate provisions for reliable and retrievable backup of the records. Security to student records is managed through access granting and the confidentiality required of those with access is outlined in a state document titled *An Employee's guide to Standards of Conduct in Montana State Government*. Expectations and requirements of data stewardship are outlined in the Enterprise Data Stewardship Policy, most recently revised on July 25, 2017. Employees needing access to student data through the student information system must be evaluated and approved by the Registrar.

2.D.8. The institution provides an effective and accountable program of financial aid consistent with its mission, student needs, and institutional resources. Information regarding the categories of financial assistance (such as scholarships, grants, and loans) is published and made available to prospective and enrolled students.

The institution provides a program of financial aid consistent with its mission, student needs, and institutional resources. Information on financial aid and scholarship programs are available on the Financial Aid and Scholarship website at http://www.msubillings.edu/finaid/. Specific populations of students receive assistance with specialized funding and services through the Student Support Services Office, Upward Bound program, and the Educational Talent Search. The Office of Financial Aid awards a limited amount of need based scholarships; the administration has the authority to award a specified number of talent and academic performance based scholarships. The financial aid office reviews the distribution of financial aid to evaluate the effectiveness of the awards.

2.D.9. Students receiving financial assistance are informed of any repayment obligations. The institution regularly monitors its student loan programs and the institution's loan default rate.

Students receiving financial assistance are informed of repayment obligations through a multi touch point program on financial literacy. This program is integrated into many different student experiences, including orientation, first year seminar courses, and academic advising.

<u>Compliment:</u> The Financial Aid office is very intentional about directly communicating to students on a semester basis student loan information. The communication includes information on loan amounts, lender names and projected repayment sums. Multiple constituents mentioned the helpfulness of this communication and that of the staff in the Financial Aid office.

> 2.D.10. The institution designs, maintains, and evaluates a systematic and effective program of academic advisement to support student development and success. Personnel responsible for advising students are knowledgeable of the curriculum, program requirements, and graduation requirements and are adequately prepared to successfully fulfill their responsibilities. Advising requirements and responsibilities are defined, published, and made available to students.

The institution designs, maintains, and evaluates a systematic and effective program of academic advisement to support student development and success. The advising roles and requirements of Advising and Career Services are well defined and available to students on the website. Both students and the faculty advisor receive an e-mail when a student is moved from an advisor in Advising and Career Services to the academic department. This ensures that all parties understand who the primary program advisor is. Degree Works is utilized by all campus advisors and students to track program requirements.

> 2.D.11. Co-curricular activities are consistent with the institution's mission, Core Themes, programs, and services and are governed appropriately.

Co-curricular activities are consistent with the institution's mission, core themes, programs and services and are managed and governed appropriately through the Student Union and Activities Office. Students are encouraged to become involved and engaged in campus life and in the Billings community.

> 2.D.12. If the institution operates auxiliary services (such as student housing, food service, and bookstore), they support the institution's mission, contribute to the intellectual climate of the campus community, and enhance the quality of the learning environment. Students, faculty, staff, and administrators have opportunities for input regarding these services.

Auxiliary services at MSU Billings include Housing and Residence Life, Students Union and Activities/Events, Dining services, Campus Store and Student Health Services to name a few. These services support the institution's missions and enhance the quality of the learning environment through effective programming. Some of the services relate to student well-being, academic support, student leadership positions and course material sales. MSU Billings moved to an all online course material sales program that provides students with textbook cost comparisons, and offers a discount if the books are shipped to the campus bookstore. Students,

faculty and staff have input into this services through advisory boards, routine meetings, feedback boxes and surveys.

2.D.13. Intercollegiate athletic and other co-curricular programs (if offered) and related financial operations are consistent with the institution's mission and conducted with appropriate institutional oversight. Admission requirement and procedures, academic standards, degree requirements, and financial aid awards for students participating in co-curricular programs are consistent with those for other students.

The Chancellor has oversight over the intercollegiate athletic program, with the Athletic Director reporting directly to the Chancellor. Items regularly reviewed include budget, staffing, gender equity, NCAA compliance and academic achievement. The application of student services policies and process apply to athletes in the same manner as they do for the general student body. The athletic program is consistent with the institution's mission, as evidenced by the high academic achievement of student athletes.

2.D.14. The institution maintains an effective identity verification process for students enrolled in distance education courses and programs to establish that the student enrolled in the distance education course or program is the same person whose achievements are evaluated and credentialed. The institution ensures the identity verification process for distance education students protects student privacy and that students are informed, in writing at the time of enrollment, of current and projected charges associated with the identity verification process.

The identity verification process for student enrolled in distance education courses requires all users set up a new user profile upon entry into the institution. This setup requires the configuration of five challenge questions and offers an alternate e-mail or text for secondary validation of password resets. Users must know their NetID and MSU Billings ID and date of birth to create this account. This user ID and password must be used to access all MSU Billings services, including the D2L learning management system, and must be reset every 180 days. The student authentication policy is available to all online students and can be found publicly at https://www.msubillings.edu/it/elearning/authpolicy.htm.

2.E Library and Information Resources

2.E.1. Consistent with its mission and Core Themes, the institution holds or provides access to library and information resources with an appropriate level of currency, depth, and breadth to support the institution's mission, Core Themes, programs, and services, wherever offered and however delivered.

2.E.2. Planning for library and information resources is guided by data that include feedback from affected users and appropriate faculty, staff, and administrators.

2.E.3.Consistent with its mission and core themes, the institution provides appropriate instruction and support for students, faculty, staff, administrators, and others (as appropriate) to enhance their efficiency and effectiveness in obtaining, evaluating, and using library and information resources that support its programs and services, wherever offered and however delivered.

2.E.4. The institution regularly and systematically evaluates the quality, adequacy, utilization, and security of library and information resources and services, including those provided through cooperative arrangements, wherever offered and however delivered.

The MSU Billings Library holds sufficient resources or access to appropriate resources through electronic databases and lending agreements with other libraries. To ensure appropriate support for MSU Billings programs, librarians work continuously with academic departments and a variety of institution committees to learn of current curriculum and anticipated changes. Librarians continuously evaluate current print and electronic resources for currency and pertinence to MSU Billings' programs, wherever and whenever offered. All students and faculty, wherever located, have access to electronic resources, research assistance, library instruction, and print resources. Policies governing methods of access to print resources and electronic resources from MSU Billings collections and those obtained elsewhere are clear.

The library engages is ongoing assessment of collections and services through surveys, operational data, and feedback through participation in university committees. Usage data informs decisions about development of information resources as well as the types, extent, and delivery of services offered to each constituent. Outdated and no longer pertinent materials are removed from the physical and electronic collections. While librarians actively participate in planning library support for existing academic programs, they do not participate in the defining of information resources needed for proposed new programs.

The MSU Billings Library has a robust instruction program that effectively uses a variety of face-to-face, online, and social media to teach students how to use the library and how to do research. Students' research skills needs are met through instruction targeted to meet the requirements of specific classes and through *LSCI 125 Research in the Information Age*, a course offered both in person and online. This three-credit course is an option for fulfillment of the General Education Global Academic Skills category. All instruction is evaluated so that improvement can be made.

Security of the library's on-site and remotely accessed resources is safeguarded by the same physical and electronic methods used throughout MSU Billings.

Compliment: Librarian staff members offer an impressive array of on-line support for students and faculty in formats that students find appealing. Librarian staff members engage in an impressive array of community outreach through a long-time successful lecture series, book clubs, and other outreach to the broader Billings community and within MSU Billings. Library staff actively participate at all levels of academic and broader university planning and apply knowledge gained to the development of supportive library services and information resources.

2.F Financial Resources

> 2.F.1. The institution demonstrates financial stability with sufficient cash flow and reserves to support its programs and services. Financial planning reflects available funds, realistic development of financial resources, and appropriate risk management to ensure short-term solvency and anticipate long-term obligations, including payment of future liabilities.

MSU Billings demonstrates financial stability with sufficient cash flows and reserves to support its programs and services. MSU Billings has experienced declining enrollments since 2011, which includes a 14% decline since 2015. Declining enrollment has resulted in reduced revenues from tuition and fees. With exception of State Performance Based funding, State appropriations have held relatively steady during this period. While operating expenses have also declined by 4% in the last three years, cash flows from all sources of revenue did not cover all operating expenses. MSU Billings utilized reserves to balance its budget in the last three fiscal years of the accreditation cycle, and MSU Billings explains that some reserve accounts were at or above upper limits established by the Board of Regents' policies, therefore making a drawdown of those accounts necessary. The use of reserve accounts to balance the budget did allow MSU Billings to use State appropriations to cover the costs of one-time expenditures for items that have benefited the university.

Financial management reflects appropriate control of risks, which are also substantially mitigated by MSU Billings being part of the Montana State University System. As such, state financial audits are based on consolidated financial statements that include the Montana State University System as a whole. Long-term obligations of MSU Billings appear conservatively placed with a debt ratio of 1.76, indicating sufficient resources to cover its long-term debt obligations.

> 2.F.2. Resource planning and development include realistic budgeting, enrollment management, and responsible projections of grants, donations, and other non-tuition revenue sources.

Resource planning at MSU Billings reflects realistic budgeting and enrollment management. Video recorded budget briefings and the Chancellor's Budget updates found online at the MSU Billings Budget Committee webpage, outline in detail how MSU Billings accounts for enrollment changes between academic years and semesters. The presentations clearly explain the

complexities and uncertainties of predicting enrollment outcomes. MSU Billings, through its conservative enrollment predictions and tuition reserves, budgets responsibly to address a fluid enrollment environment. As funding amounts received from other non-tuition revenue sources such as grants and donations have not varied significantly over time, MSU Billings is able to make responsible projections of these sources of revenue during the budgeting process.

> 2.F.3. The institution clearly defines and follows its policies, guidelines, and processes for financial planning and budget development that include appropriate opportunities for participation by its constituencies.

MSU Billings employs well-documented policies, processes, and timelines to establish its financial planning and budget development procedures. The process is inclusive of appropriate constituencies who need to be involved at the department level during budget development. A wealth of online information exists on the Budget Office webpage to demonstrate that MSU Billings follows its budgeting policies. These resources include budget policies, budget forms, budget cycle schedules as well as training materials that define budget terminology and acronyms, funds and sub-fund types, program types, and expenditure categories. MSU Billings reports that at the last Budget Committee meeting held in February 2018, MSU Billings made all final decisions and necessary directives to balance the institutions FY19 Budget.

Compliment: MSU Billings is complimented for maintaining budgeting resources that are easily accessed and understood.

> 2.F.4. The institution ensures timely and accurate financial information through its use of an appropriate accounting system that follows generally accepted accounting principles and through its reliance on an effective system of internal controls.

MSU Billings utilizes the Banner Enterprise Resource Planning system, and industry recognized accounting system software designed specifically for university applications. The Banner system presents accounting information and statements in compliance with Generally Accepted Accounting Principles (GAAP) and the Government Accounting Standards Board (GASB). MSU Billings prepares accounting statements consistent with the National Association of College and University Business Officers (NACUBO) published standards, as well as with IPEDS financial reporting requirements.

MSU Billings employs a robust set of accounting controls that detail the appropriate separations of duties, and which mitigate the risks of impropriety with the use of institutional funds. The institution's roadmap documents outline controls compliance requirements and reference accounting policies and guidance from multiple sources including NACUBO and the system Office of the Commissioner of Higher Education in Montana. The MSU Billings roadmap controls document also includes requirements that are specific to MSU Billings.

2.F.5. Capital budgets reflect the institution's mission and Core Theme objectives and relate to its plans for physical facilities and acquisition of equipment. Long-range capital plans support the institution's mission and goals and reflect projections of the total cost of ownership, equipment, furnishing, and operation of new or renovated facilities. Debt for capital outlay purposes is periodically reviewed, carefully controlled, and justified, so as not to create an unreasonable drain on resources available for educational purposes.

MSU Billings capital planning activities reflect the mission and core theme objectives established by the institution and which further relate to renovation or new construction of physical facilities and the attainment of the university's requisite equipment needs. Proposed facility requirements for all State entities including Montana University System, and MSU Billings specifically, are recorded in the State of Montana Long Range Building Program (LRBP). MSU Billings actively evaluates its deferred maintenance through the use of Facility Condition Assessments (FCAs). Evaluation of building FCAs, along with a comparison between the accumulated costs of deferred maintenance and current replacement values, help guide MSU Billing's prioritization of its capital project requests. This analytical comparative process effectively incorporates total cost of ownership into MSU Billings capital development planning strategies.

Future capital planning appears to specifically address opportunities found in Core Theme 5, focusing on advocacy of four high priority capital development projects as found in Section D, items 1 through 4, page 39 of the Year 7 self-report. Through its internal budgeting procedures and master planning processes, MSU Billings ensures that its capital outlays do not place an unreasonable drain on institutional resources that should otherwise be made available for educational purposes.

2.F.6. The institution defines the financial relationship between its general operations and its auxiliary enterprises, including any use of general operations funds to support auxiliary enterprises or the use of funds from auxiliary services to support general operations.

For capital development proposals to be included in the Long Range Building Program (LRBP), Montana University System schools submit preliminary project requests that identify individual areas of greatest need. A consolidated list of project requests is submitted along with costs estimates to the Presidents of Montana State University and University of Montana for discussion and final system prioritization. The President's prioritization occurs one-year prior to the opening of the biennium legislative session. The Board of Regents, with assistance from the Department of Administration's, Architecture and Engineering Division (A&E), participate in a review of capital development requests from all 17 state schools within the Montana University System. Project proposals are slated for inclusion in the LRBP six months prior to the legislative

session. A&E then publishes the Governor's capital budget request for consideration by the Montana legislature one month prior to the opening of the biennium legislative session.

Capital development funding for Education and General (E&G) projects depend on state support, while non-state funded facilities are funded as a function of internal resource allocation and capital outlays that require the approval of the Montana State University System, Office of the Commissioner for Higher Education, and the State Legislature.

The institution employs Memorandums of Understanding (MOU) between its administrative E&G service units and its auxiliary enterprises. The MOUs clearly indicate that auxiliary enterprises must generate sufficient revenues to be self-supporting. Expenditures such as utilities are paid by the auxiliary enterprises, while custodial services and repairs are passed on to the auxiliaries at standard published recovery rates. The MOU's also specifically list any costs to be paid from E&G funding sources to auxiliaries as rents due for E&G functions that occupy space in auxiliary buildings. MOU agreements are clearly written and adequately specify the sources and uses of general educational and auxiliary funds to cover assigned costs.

> 2.F.7. For each year of operation, the institution undergoes an external financial audit, in a reasonable timeframe, by professionally qualified personnel in accordance with generally accepted auditing standards. Results from the audit, including findings and management letter recommendations, are considered in a timely, appropriate, and comprehensive manner by the administration and the governing board.

The University is audited on a biennial basis by the State of Montana Legislative Audit Division to correspond with the State biennium legislative assembly process. The audit is a consolidated report containing the aggregated financials of the four state campuses that make up the Montana State University System. The biennium audit independently reports appropriated financials for each of the two years in the biennium, as well as the year immediately preceding that period. Annual IPEDS reporting by the university corresponds with presentations contained within the state audit report.

Significant issues impacting specific institutions in the Montana State University System are found within the Management, Discussion and Analysis section of the audit report. The most recent Annual Financial Audit Report for FY16 and the Compliance Audit Report for the FY16 and FY 17 biennium do not indicate any findings or recommendations, nor does it direct management analysis toward any business practices of MSU Billings specifically.

> 2.F.8. All institutional fundraising activities are conducted in a professional and ethical manner and comply with governmental requirements. If the institution has a relationship with a fundraising organization that bears its name and whose major purpose is to raise funds to support its mission, the institution has a written agreement that clearly defines its relationship with that organization.

Fundraising activities of the MSU Billings Foundation are found in an operating agreement between the Foundation and the institution. The agreement defines the character of the relationship of the Foundation to MSU Billings as strategically enhancing and expanding alumni engagement. The agreement plainly stipulates the responsibilities of each party, as well as defining the relationship of joint organizational membership. The role of the Chancellor for MSU Billings, an ex officio non-voting member of the Foundation, is to communicate to the Foundation CEO all current funding priorities of the institution. The Foundation CEO then determines the feasibility of securing private funding as a means to prioritize institutional objectives.

The professional and ethical conduct of the Foundation's fundraising initiatives are established within the Agreement, which include requirements for: 1) maintaining records using generally accepted accounting standards; 2) independent annual audits; 3) asset management in compliance with the Uniform Investor Act and the Uniform Prudent Management of Institutional Funds Act; and, 4) proper and legal dispersal of funds between the Foundation and MSU Billings. The Foundation must also comply with the Board of Regent policies and procedures covering conflict of interest, personnel whistleblower provisions, and adherence to Section 901.9 of the Montana Board of Regents Higher Education Policies and Procedures Manual.

2.G Physical and Technological Infrastructure
2.G.1- 4. Physical Infrastructure

> 2.G.1. Consistent with its mission, Core Themes, and characteristics, the institution creates and maintains physical facilities that are accessible, safe, secure, and sufficient in quantity and quality to ensure healthful learning and working environments that support the institution's mission, programs, and services.

Consistent with MSU Billings' mission and its core themes, the institution creates and maintains physical facilities that are safe, secure, accessible, and in sufficient quantity and quality to promote healthful learning and productive working environments that support the institutions programs and services it offers.

Through its process of facility condition assessment (FCA), and in concert with the State of Montana Architectural and Engineering (A&E) department, MSU Billings demonstrates a good awareness of its deferred maintenance liabilities. Accordingly, MSU Billings appropriately prioritizes renovation proposals versus proposals for new capital development projects. The department of Facilities Services utilizes customer surveys to measure its overall effectiveness in providing clean and functional facilities. In its most recent 2017 survey, 87% or better of 278 students, faculty, and staff respondents rated the following campus physical attributes as "Good", "Very Good", or "Excellent": *Customer Service; Health, Safety, and Accessibility of Buildings; Quality of O&M; Quality of Custodial and Cleanliness of Classrooms; Availability of Classroom Space; Quality and Appearance of Grounds Buildings, Classrooms and Offices*. MSU Billings' highest "Good" or better rating was Customer Service at 93% of respondents, while its

lowest survey rating was for HVAC and environmental systems at 80%. Lower customer satisfaction with comfort control is not at all uncommon given the variances in perception of human comfort, the degree to which obsolescence in HVAC systems affect comfort, and the extreme costs of retrofit or replacement of HVAC systems in aging institutional buildings.

Compliment: During the campus visit, the evaluation team was able to visit nearly all buildings and ground areas on the MSU Billings campus. The evaluation team compliments MSU Billings for the condition and cleanliness of campus buildings and grounds.

> 2.G.2. The institution adopts, publishes, reviews regularly, and adheres to policies and procedures regarding the safe use, storage, and disposal of hazardous or toxic materials.

The institution adopts, publishes, regularly reviews, and adheres to policies and procedures relating to safe use, storage, and disposal of hazardous materials. Contact names of appropriate responders or agencies are listed in the MSU Billings safety documents for non-emergency and emergency spills. Material safety data sheets for chemicals and toxic materials used on campus are required to be located as close as possible to the areas where the materials are being utilized. Lab safety plans that are produced by instructors are reviewed by the hazardous waste material coordinator, who is located in the sciences building where MSU Billings teaching labs are located. The coordinator provides some orientation training to new personnel, training on request, and other periodic training as requested.

The evaluation team inquired with MSU Billings why its information regarding hazardous materials policies were not easily located by the Team. MSU Billings distributes responsibility for hazardous material use and management among its departments, while oversight and management of published policies for hazardous waste disposal on campus is centralized to the hazardous waste material coordinator. MSU Billings reports that its small campus community size allows for effective communication between departments and the hazardous waste material coordinator whenever required to address concerns or to share resources.

> 2.G.3. The institution develops, implements, and reviews regularly a master plan for its physical development that is consistent with its mission, Core Themes, and long-range educational and financial plans.

The Institution develops, implements and regularly reviews a master plan for campus physical development that is consistent with its mission and core themes. The MSU Billings master plan identifies physical development that is found in the Long Range Building Plan (LRBP) for the State of Montana. This signifies that the Board of Regents and the State of Montana have endorsed MSU Billings master planning initiatives. Consistent with its stated needs and strategic direction, the institution has demolished a building on campus that was a liability to operate and maintain. The university also worked diligently to raise funds to match a $10 million State of Montana

earmark for the renovation of a 49,000 square foot Sciences facility. The project which will be constructed in early 2019 also adds 30,000 new square foot to the Sciences facility. The renovated and expanded facility addresses university objectives found in Core Themes 2 and 5. Other planning that is tied to non-state funded initiatives, such as athletics and on-campus housing, are included in the LRBP as "authority" only requests of the institution. Funding for bonded projects are approved by the Board of Regents and the Montana State University System as part of their comprehensive financial planning process.

> 2.G.4. Equipment is sufficient in quantity and quality and managed appropriately to support institutional functions and fulfillment of the institution's mission, accomplishment of Core Theme objectives, and achievement of goals or intended outcomes of its programs and services.

MSU Billings provides equipment for maintaining infrastructure and for student learning needs in sufficient quantities, and of sufficient quality, to meet the institution's mission as well as its goals for accomplishing core themes, and for attainment of intended programs and services.

Several recent mechanical system upgrades have been accomplished to include the Student Union, Science Building and Physical Education Building. Executing these project priorities is consistent with Facilities Services survey analysis, which indicated a lower campus satisfaction rating for HVAC and environmental control systems in some campus buildings. With tight budget constraints, MSU Billings has secured over $100,000 in safety and loss mitigation grants to replace aging equipment such as a new Bobcat, hydraulic lift gates, a utility line locator, and a new two-ton utility truck. In the last three years, $2.5 million was allocated by the University for new, or upgraded, student instructional equipment at the Physical Education and Liberal Arts Buildings. Laboratory equipment was also upgraded for the University's biology, chemistry, and physics labs. Additionally, partnerships between MSU Billings and the local medical community was instrumental in securing $1 million in new equipment for students and faculty researchers that included a nitrogen compressor for a campus laser lab.

Compliment: MSU Billings is complimented for its resourcefulness in securing grants and developing partnerships to supplement its funding for infrastructure as well as student learning and researcher equipment needs.

2.G.5- Technological Infrastructure
> 2.G.5. Consistent with its mission, Core Themes, and characteristics, the institution has appropriate and adequate technology systems and infrastructure to support its management and operational functions, academic programs, and support services, wherever offered and however delivered.

MSU Billings owns, operates, and maintains appropriate and adequate technology systems and infrastructure to support university management and operational functions, academic programs, and support services that are consistent with institutional core themes and university mission.

The Office of Information Technology at MSU Billings is responsible for IT equipment and software procurement, as well as the effective learning, utilization, and troubleshooting of IT infrastructure as employed by students, faculty, and staff. The MSU Billings IT office is also responsible for data management and analysis for Institutional Research (IR) functions at the institution. IR staff often carry dual roles of implementing and upgrading technology as well as managing and reporting data to the campus. IT support services include planning for, operation of, and training resources for multiple university systems to include the Banner Enterprise Resource Planning system; T2 parking management software; StarRez, a housing management software; and, CBORD to list a few. IT also services numerous software packages typically found on many university campuses such as Microsoft 365, Cisco, AutoCad, and a GIS system.

MSU Billings demonstrates flexibility in supporting evolving technological applications by facilitating an increasing number of migrations to the cloud as well as third-party software integrations into Banner. In addition to IT services that support standard classroom instructional technology such as computers, projectors, and Elmos, the Office also provides operational and training support for two state of the art interactive instructional spaces referred to as TEIL classrooms (Technologically Enhanced Interactive Learning). To ensure the viability of IT services, wherever offered and however delivered, MSU Billings replaces general computing hardware on a four-year rotational basis, and network infrastructure every six-years.

> 2.G.6. The institution provides appropriate instruction and support for faculty, staff, students, and administrators in the effective use of technology and technology systems related to its programs, services, and institutional operations.

Through e-Leaning workshops and help desk function, appropriate instruction in the effective use of technology and IT systems is being provided by MSU Billings to its students, faculty, and staff as it relates to educational programs and delivered services. Banner training includes financial aid, university finance, human resources functions and student information modules. Likewise, as MSU Billings will be migrating from Banner 8 to Banner 9, the Office of Information Technology is gearing up to provide the campus with a collaborative training and development plan so that the transition can be completed by December 2018. Staff members are given work release time and are funded by MSU Billings for local and online training programs.

IT and e-Learning staff collaborate to provide required faculty technical training for the proper use of TEIL classrooms. Training also includes discussions of best practices in the use of technology for instruction. Media Service Staff provide training of multimedia utilization in auditoriums and similarly equipped classrooms. Training for new faculty and back-to-school refresher training is made available to faculty and associated support staff that focuses on

enhancing delivery of MSU Billings online course offerings. Multiple online training resources are also made available to the university community including Microsoft, Adobe, and cloud application training.

As the Office is also responsible for Institutional Research, it provides training and monthly data discussion in a roundtable format for those on campus with a need or desire to evaluate and understand the multiple formats of campus analytics. Some topics for the monthly data discussions included, *Let's Talk Retention*, *OCHE Performance Based Funding*, and *Academic Program Metrics and Student Satisfaction Inventory Results*.

> 2.G.7. Technological infrastructure planning provides opportunities for input from its technology support staff and constituencies who rely on technology for institutional operations, programs, and services.

> 2.G.8. The institution develops, implements, and reviews regularly a technology update and replacement plan to ensure its technological infrastructure is adequate to support its operations, programs, and services.

IT services at MSU Billings incorporates inclusive planning processes that provide input opportunities for students, faculty and staff. IT-focused meetings are convened at MSU Billings to discuss and to prioritize the campus' current and future IT needs. MSU Billings also participates in collaborative planning on IT initiatives with the three other MSU system institutions. The product of this collaboration is the development of a coordinated IT business plan that is provided to the OneMSU governance council for final system-wide prioritizations.

Internal IT planning processes have produced two campus-wide planning documents. The Academic Computing Cost Planning Document lists IT hardware and software assets with replacement costs and projected replacement dates through the year 2023. IT also maintains an Enterprise Initiative Projects Overview chart for a rolling 18 month period. The chart identifies major system support and maintenance initiatives being managed by IT services, while establishing and updating target start and completion dates during the 18 month cycle. MSU Billings employs a responsible turnover cycle of computing hardware, network infrastructure, and maintains the adequacy of software updates and licenses.

Section Three – Institutional Planning
3.A.1-5. Institutional Planning
> 3.A.1. The institution engages in ongoing, purposeful, systematic, integrated, and comprehensive planning that leads to fulfillment of its mission. Its plans are implemented and made available to appropriate constituencies.

> 3.A.2. The institution's comprehensive planning process is broad-based and offers opportunities for input by appropriate constituencies.

3.A.3. The institution's comprehensive planning process is informed by the collection of appropriately defined data that are analyzed and used to evaluate fulfillment of its mission.

3.A.4. The institution's comprehensive plan articulates priorities and guides decisions on resource allocation and application of institutional capacity.

3.A.5. The institution's planning includes emergency preparedness and contingency planning for continuity and recovery of operations should catastrophic events significantly interrupt normal institutional operations.

MSU Billings engages in on-going, purposeful, systematic, integrated, and comprehensive planning. There are several planning processes that take place across the campus: facilities and information technology campus planning, program planning, strategic planning, and budget planning. Strategic planning happens both at the departmental and campus-levels. The FutureU plan was developed by a broad group of 37 campus and community members in the spring and fall semesters of 2012. The continued and significant changes in leadership have made it challenging for the campus to have effective follow through the goals and objectives of the plan. In fact, one of the five Chancellors between 2014 and 2018 completely stopped the process to design and develop a new strategic plan. The institution does an exceptional job engaging campus and community stakeholders in their planning process. The Community Taskforce and their March 2018 report is an example of this work. MSU Billings has a strong Institutional Research office who is part of the planning and assessment processes. Institutional Research has developed a comprehensive data dashboard for campus stakeholders as a tool to analyze and evaluate mission fulfillment. The Institutional Research director and staff participate as members of various standing committees such as the Assessment and Accreditation committee, Council on Enrollment Management, the Student Affairs Council, Athletic Compliance Committee, and the University Budget Committee.

In 2013, MSU Billings created an Academic Prioritization Council to determine whether the current programs should be maintained, grown, integrated into other programs, or phased out. This process resulted in the review of 160 programs: 90 were maintained, 36 were identified to grow, 15 for integration, and 19 to be phased out. Beginning in the fall of 2017 an annual program health report was collected, but the turnover in leadership has impacted consistency in accomplishing this for more than one year.

MSU Billings addresses emergency preparedness and contingency planning through a variety of mechanisms. Facility Services has developed a Pre-Disaster Mitigation plan in 2007 in conjunction with the Montana Office of the Commissioner of Higher education, the Montana University System, and the Montana State University Extension Disaster Education Network. The institution has an emergency preparedness website with detailed and necessary information for the campus community (http://www.msubillings.edu/police/emergency_preparedness.htm).

The campus uses an emergency notification system that also encourages community members to sign up for the service. MSU Billings also has appropriate plans in place to address continuity of operations and recovery of data.

Section Four – Core Theme Effectiveness and Improvement
3.B Core Theme Planning

3.B.1. Planning for each Core Theme is consistent with the institution's comprehensive plan and guides the selection of programs and services to ensure they are aligned with and contribute to accomplishment of the Core Theme's objectives.

3.B.2. Planning for Core Theme programs and services guides the selection of contributing components of those programs and services to ensure they are aligned with and contribute to achievement of the goals or intended outcomes of the respective programs and services.

3.B.3. Core theme planning is informed by the collection of appropriately defined data that are analyzed and used to evaluate accomplishment of Core Theme objectives. Planning for programs and services is informed by the collection of appropriately defined data that are used to evaluate achievement of the goals or intended outcomes of those programs and services.

Core Theme 1: Cultivating Teaching Excellence

Planning for Core Theme 1: Cultivating Teaching Excellence, was accomplished by MSU Billings' Strategic Planning Initiative Committee as part of the development of the institution's mission and strategic plan. Because of this, there is a continuous line between formulation of the general plan, formulation of the core theme and *Opportunities to Achieve*, and assessment of those opportunities. It also allows for identification of programs and services that can contribute to Core Theme 1 fulfillment. The Assessment and Accreditation Council, through its review of outcomes, is in a position to recommend to the administration additional programs and services that may further contribute to Core Theme 1 fulfillment. Core Theme 1 could be informed by program assessment data, although no indicator is based on such data.

Core Theme 2: Providing an Environment for Learning

Planning for Core Theme 2: Providing an Environment for Learning, was accomplished during the strategic planning process that resulted in the institution's mission. Through this process, several *Opportunities to Achieve* were identified, including the programs and services through which those opportunities could be fulfilled. Indicators were identified as well in that process and are regularly collected and analyzed by the Assessment and Accreditation Council to understand progress. The learning environment implicitly is defined broadly for Core Theme 2, in that much more than the classroom environment is meant; MSU Billings could define Core Theme 2 more explicitly for clarity. Student learning outcomes, when available, could be used to inform Core Theme 2.

Core Theme 3: Promoting and Engaging in Civic Responsibility

Planning for Core Theme 3: Promoting and Engaging in Civic responsibility is led by the MSU Billings' Strategic Planning Initiative Committee and the Assessment and Accreditation Council. Individual units of the institution directly responsible for civic engagement initiatives (e.g., Office of Community Involvement - now part of the Center for Engaged Learning, and the Office of International Studies) are responsible to implement related activities. The coordination between strategic planning and the core themes ensures alignment between the institution's strategic plan and its core themes. The institution has reviewed its resources, programs, and activities to determine how to further achievement of *civic responsibility*, and implemented specific initiatives such as service learning courses, service learning faculty awards, community projects, and global learning programs. It is tracking indicators for Core Theme 3 to identify progress, although the indicators focus on inputs (numbers) rather than outputs (learning). Recently, the Office of Community Involvement has been folded into the Center for Engaged Learning. The new Center does not track service learning coursework; this responsibility has yet to be assigned, but the intent is to have faculty responsible for it. The Office of International Studies indicates that administrative support and resources are in place for its initiatives. This office is forward-thinking and working closely with faculty on internationalization initiatives. It is important for the entities responsible for this core theme to coordinate, and for related institutional oversight committees to ensure that initiatives are aligned, appropriate data-based decisions are made, resources are allocated, and goals are achieved.

Core Theme 4: Enhancing the Community

Planning for Core Theme 4: Enhancing the Community, was established through the MSU Billings' Strategic Planning Initiative Committee. Core Theme 4 demonstrates connection to MSU Billings' mission. The institution has a large service area which provides a challenge to be inclusive of all areas; however, there is demonstration of community outreach and engagement. There is demonstrated community involvement in planning and development of community needed programs and services. The Big Sky Economic Development, the Community Taskforce, and interaction with business leaders throughout the community has been demonstrated through throughout documentation in this report, as well as supported through interviews conducted as part of this site visit. The Assessment and Accreditation Council has the overall responsibility to assure Core Them 4 is being met and is in alignment with the mission of MSU Billings. The following areas have been tasked with development and implementation of Core Theme 4: Extended Campus, the Women's Study Center, the Office of Advising and Career Services, the Library, the Office of New Student Services, and the Office of Community Involvement. The planning for Core Theme 4 has been achieved, however, the Assessment and Accreditation Council needs to ensure overall alignment and collaboration of achievement to continue to fulfill Core Theme 4.

Core Theme 5: Essentials for Success

Planning for Core Theme 5: Essentials for success, was established through the MSU Billings' Strategic Planning Committee. The committee outlined four *Opportunities to Achieve* by which the institution community could pursue fulfilment of Core Theme 5. The *Opportunities to Achieve*

are: 1) Enhance efficiency, awareness, and operations across campus; 2) Evaluate and re-assign personnel and financial resource to match strategic plan priorities; 3) Enhance communication concerning our relevant image across all stakeholders; and 4) Update university facility plans to integrate with FutureU. There are three indicators of success in the institution's pursuit of Core Theme 5, and they receive regular review to ensure that they reflect an accurate picture of the institution's values and vision. The collection of this data by the Assessment and Accreditation Council and its use demonstrates that planning for programs and services is informed by appropriately defined data that are used to evaluate the objectives of Core Theme 5. A table on page 175 of the Year Seven Report indicates that two of the three indicators were met.

4.A.1- Assessment

4.A.1. The institution engages in ongoing systematic collection and analysis of meaningful, assessable, and verifiable data—quantitative and/or qualitative, as appropriate to its indicators of achievement—as the basis for evaluating the accomplishment of its Core Theme objectives.

4.A.2. The institution engages in an effective system of evaluation of its programs and services, wherever offered and however delivered, to evaluate achievement of clearly identified program goals or intended outcomes. Faculty have a primary role in the evaluation of educational programs and services.

4.A.3. The institution documents, through an effective, regular, and comprehensive system of assessment of student achievement, that students who complete its educational courses, programs, and degrees, wherever offered and however delivered, achieve identified course, program, and degree learning outcomes. Faculty with teaching responsibilities are responsible for evaluating student achievement of clearly identified learning outcomes.

4.A.4. The institution evaluates holistically the alignment, correlation, and integration of programs and services with respect to accomplishment of Core Theme objectives.

4.A.5. The institution evaluates holistically the alignment, correlation, and integration of planning, resources, capacity, practices, and assessment with respect to achievement of the goals or intended outcomes of its programs or services, wherever offered and however delivered.

4.A.6. The institution regularly reviews its assessment processes to ensure they appraise authentic achievements and yield meaningful results that lead to improvement.

Core Theme 1: Cultivating Teaching Excellence

Core Theme 1 is evaluated using indicators identified by the Assessment and Accreditation Council. It is unclear how three of these indicators relate to Core Theme 1. Only e-learning

professional development funds seems pertinent to the cultivation of teaching excellence. Professional development funds for faculty do seem oriented toward pedagogy, as indicated in the description of Opportunity D, but it is not obviously the case from the indicator itself. Others seem oriented toward research or even toward staff who do not teach. The *Opportunities to Achieve* under Core Theme 1 have been assessed through faculty review processes, final reports made after grant periods, documentation of funds spent on professional development and grant funds received, and evaluations of customer service in the Grants and Sponsored Programs office. For each individual Opportunity to Achieve, these assessment processes seem well thought out and executed, if focused to some degree on process. However, student learning outcomes could be used to help assess progress on several of the Opportunities, including A and D.

Assessment of student learning outcomes is occurring at MSU Billings; however, by its own admission, some departments have not adopted a culture of assessment as well as others. The institution seems to be understanding of its position and interested in improving practices across all departments and disciplines. However, more needs to be accomplished to truly be able to use student learning outcomes in assessment of mission and core themes. The Assessment and Accreditation Council has responsibility for evaluation of assessment results across all core themes. This allows for holistic evaluation of accomplishment of core theme objectives and outcomes of programs and services.

Core Theme 2: Providing an Environment for Learning
Core Theme 2 is evaluated using indicators identified in the planning process. These indicators generally are meaningful, although they do not comprehensively cover the *Opportunities to Achieve* under Core Theme 2. The *Opportunities to Achieve* under Core Theme 2 have been assessed through various means. All of these means have some validity; however, in all cases further means could have been used, including student learning outcomes. In other cases relatively obvious metrics such as overall enrollment for Opportunity A and the number or percent of international students for Opportunity E were not used. Student learning outcomes are being measured at MSU Billings, although some areas are well ahead of others in implementing student learning outcome assessment. This fact hampers the institution's ability to use student learning outcomes in core theme assessment. There is evidence that MSU Billings takes a holistic approach to the alignment, correlation, and integration of planning, programs, and services through the Assessment and Accreditation Council, which is composed of University leaders across divisions. This body has reviewed such items as core theme indicators and revised them during this accreditation cycle.

Core Theme 3: Promoting and Engaging in Civic Responsibility
Core Theme 3 is evaluated by three indicators and related targets. The indicators are number of service learning courses, volunteer hours, and study abroad enrollments. Targets have been set for each of these indicators, two of which have been reached (service learning courses, volunteer hours). Core Theme 3 is currently being assessed by increasing the number of students participating in order to reach specific targets. Student learning outcomes associated with Core

Theme 3 are collected at the program level and reviewed by deans, but are not formally part of the assessment of this theme. Recently these program learning outcomes reports were reviewed by the Assessment and Accreditation Council with the intent to make this a regular practice. Core theme assessment processes are under the direction of the Assessment and Accreditation Council in coordination with the Strategic Planning Committee to ensure alignment of planning and improvement. Some evidence of the integration of planning and use of resources was provided by the Director of the Office of International Studies and Outreach who shared the institution's goals for internationalization, consisting of study abroad, international research opportunities for faculty, and hosting international students. This initiative also involves integrating international students with the local community for internships, homestays, and other activities. Ensuring the coordination of the various entities responsible to key initiatives related to Core Them 3 is crucial as is the appraisal of authentic achievements and meaningful results that lead to improvement, the latter of which does not seem to be occurring to much extent.

Core Theme 4: Enhancing the Community
Core Theme 4 is evaluated based on 4 indicators. The assessment processes is the responsibility of the Assessment and Accreditation Council, which is comprised of Faculty, Deans of the colleges, Directors, Chief Information Officer, Vice Provost for Academic Affairs, President of the Associated Students, Vice Chancellor, and other representatives. MSU Billings has a number of community events and demonstrated connections to the community as evidenced through the Extended Campus, Community Partnerships, and Community Task Force. Indicator one was not met, and indicators two and three were met.

There is documented evidence of participation in community events, hosting events, student participation in the community, and faculty involvement in events. For example MSU Billings demonstrate community participation through the Extended Campus, Big Sky Economic Development, and outreach to area business for needs for education and student development. There has been assessment and data compilation through review of the Community Task Force for community needs. The Extended Campus is using this information for future program development which should help meeting the benchmark for indicator one, and demonstrates evidence for indicator two. There was some discussion of closure of some of the extended campus outreach offices which could impact indicator one. The self-study indicates faculty will have leadership opportunities for enhancement of the community. Faculty presence was evidenced in the library mini-series lectures, Women Studies, sponsoring of the Science Fair, and the Research, Creativity, and Community Involvement Conference. The institution should look at the indicators for assessment of how the community events are enhancing the community to close the loop on how Core Theme 4 is leading to mission fulfillment. There is documentation of community attendance, but no documentation of how the community is enhanced.

Core Theme 5: Essentials for Success
Core Theme 5 is evaluated based on four objectives. Three indicators are identified. These indicators provide assessable and meaningful metrics for determining whether this core theme

has been achieved. The indicator Expenditure Ratio: Instruction/Total was met (the baseline was 48% and the target of 50% was achieved). The indicator Expenditure Ratio (Instruction + Academic Support + Student Services)/Total was met (the baseline was 68% and the target of 70% was exceeded). The indicator Construction Dollars Expended was not met (the baseline was $2,109,997). The target was an increase in this amount, but the actual amount expended was $1,862,351. In the response on pages 174 and 175 of the Year Seven Report, MSU Billings did not include responses that deal directly with 4.A.2 through 4.A.5. When discussed with key staff, no explanation for the oversight could be provided.

4.B Improvement

> 4.B.1. Results of Core Theme assessments and results of assessments of programs and services are: a) based on meaningful institutionally identified indicators of achievement; b) used for improvement by informing planning, decision making, and allocation of resources and capacity; and c) made available to appropriate constituencies in a timely manner.

> 4.B.2. The institution uses the results of its assessment of student learning to inform academic and learning-support planning and practices that lead to enhancement of student learning-achievements. Results of student learning assessments are made available to appropriate constituencies in a timely manner.

Core Theme 1: Cultivating Teaching Excellence

Core Theme 1 *Opportunities to Achieve* have been assessed; however, not all of these assessments are linked to Core Theme 1 indicators. For example, Opportunity A is assessed through faculty review processes, but percentages of faculty who earn tenure or promotion or pass another form of peer review are not listed as Core Theme 1 indicators. Similarly, Opportunity B is assessed partially through qualitative assessment of an annual conference, which is not related to any core theme indicator. Opportunity C also is not linked to any core theme indicator. It is not clear that results of core theme assessments and results of assessment of *Opportunities to Achieve* for Core Theme 1 are connected or based on indicators that are meaningful to achievement of the core theme. Results have led to changes and enhancements where appropriate. Assessment of student learning seems to be used to inform planning and practices where possible; however, the uneven nature of such assessment makes it difficult for MSU Billings to base all planning on student learning outcome assessment.

Core Theme 2: Providing an Environment for Learning

Core Theme 2 *Opportunities to Achieve* has been assessed, although most assessment methods are not linked to Core Theme 2 indicators. For example, Opportunity A was assessed using the University's three-year cohort default rate, an indication of affordability. However, Core Theme 2 indicators of affordability are two types of aid awarded as a percentage of total tuition. An affordability index might be another method of assessment that could be both a core theme indicator and a measure of success for Opportunity A. Opportunity A also has no measure of excellence, which is one of its two key stated areas. Retention and graduation rates, included as

Core Theme 2 indicators, are indirect measures of several opportunities, but these are not mentioned in descriptions of assessment of the opportunities themselves. Student learning outcomes are not mentioned in discussions of the *Opportunities to Achieve* related to Core Theme 2. Student learning is measured indirectly through retention rates, enrollment, and aid resources gathered. This likely is the result of the lack of consistency across MSU Billings in measuring student learning outcomes, but it is problematic because several opportunities could be assessed at least in part with student learning outcome data.

Core Theme 3: Promoting and Engaging in Civic Responsibility
For each of the four objectives for Core Theme 3, MSU Billings indicates how it has engaged in planning, assessment, and improvement. Perceptions regarding campus-wide conversations and faculty involvement in the development and assessment of the core themes and their indicators vary, possibly as a result of significant employee and leadership turnover. The institution has made considerable efforts to expand opportunities for civic engagement with responsible campus units working with faculty, entities on campus, and local and regional communities. However, data collected in order to improve outcomes for Core Theme 3 are primarily inputs, rather than reflecting student learning. Examples of actions taken related to identified indicators are expanding service learning courses, including service learning projects in the First-Year Seminar, extending partnerships with community members, enhancing town and gown relationships, and creating new global learning opportunities. More needs to be done regarding the identification and collection of meaningful student learning outcomes and use of the data collected to enhance learning. Data in individual units (e.g., Career and Student Services, Office of International Studies and Outreach) has been used, according to informal reports, but this information was not included in the Year 7 report.

Core Theme 4: Enhancing the Community
There are three indicators for measurement of Core Theme 4:
1. Clients Served through MSU Billings Extended Campus – not met (Baseline = 4,318 Metric = 1,913)
2. Community Partnerships through MSU Billings Extended Campus – met
3. Number of MSU Billings Community Events – met

Of the three indicators, only one was not met. There was some discussion of closure of some of the extended campus outreach offices which could have impacted indicator 1. However, the Extended Campus has demonstrated community outreach and collaboration, for example, with the manager training program development. Also, there was a purchase of a non-credit registration system to help improve involvement of the community and ease of use for entering community courses. In the self-study, MSU Billings states faculty will have leadership opportunities for enhancement of the community. Faculty presence is evidenced in the library mini-series lectures, Women Studies, sponsoring of the Science Fair, and the Research, Creativity, and Community Involvement Conference. The college should look at the indicators for assessment of how the community events are enhancing the community to make a complete circle back to mission fulfillment. There was evidence of documentation of a Community Task

Force with a discussion of needs which could provide this information. There is also documentation of community attendance at MSU Billings events, but not how the community is enhanced. There is assessment evidence of student learning achievements through graduate placement and community members input. City College rebranding has been an improvement with demonstrated collaboration and involvement of faculty, staff, administration and students with MSU Billings' main campus and leadership integration. This is evidence of increased shared governance improvement, student enhancement and community involvement to increase an educated workforce.

Core Theme 5: Essentials for Success
The results of Core Theme 5 assessments and the results of the assessments of programs at MSU Billings are based on institutionally identified indicators of achievement. Core Theme 5 has four objectives and three indicators of achievement. The results of the assessments of Core Theme Five and the results of these assessments led to improvements for each of the four objectives. The results of the assessments of Core Theme 5 were made available to the appropriate constituencies in a timely manner. The assessment of campus progress in pursuit of Core Theme 5 is based on measurement of indicators examined and verified for their propriety as measures of success. Appropriate constituencies have been kept informed through open forums, meetings, and campus announcements.

Section Five – Mission Fulfillment, Adaptation, and Sustainability
5.A Mission Fulfillment
> 5.A.1. The institution engages in regular, systematic, participatory, self-reflective, and evidence- based assessment of its accomplishments.

> 5.A.2. Based on its definition of mission fulfillment, the institution uses assessment results to make determinations of quality, effectiveness, and mission fulfillment and communicates its conclusions to appropriate constituencies and the public.

MSU Billings engages in regular, systematic and participatory assessment. The broad representation of campus stake holders in the FutureU strategic plan, the Community Taskforce, and committees like the Assessment and Accreditation Council are testament to the transparent and collaborative processes the institutions undertakes. In the Year 7 Self Evaluation report (pages 227-234), highlights a number of initiatives that appear to be outside of the identified core theme indicators used to assess mission fulfillment. While the initiatives are of value to the organization, there's no clear alignment of those efforts to supporting the core themes or mission fulfillment. MSU Billings has defined mission fulfillment through a target of meeting 70% of the indicators. The continued transition of key leaders at the institution significantly impacted MSU Billings' ability to make progress and stay the course with their FutureU strategic planning and assessment efforts. However, there is guarded optimism that the new Chancellor is committed to staying long-term at MSU Billings. With consistency in leadership and the efforts to develop a new strategic plan, the institution has the commitment of staff to see these efforts through.

5.B Adaptation and Sustainability

> 5.B.1. Within the context of its mission and characteristics, the institution evaluates regularly the adequacy of its resources, capacity, and effectiveness of operations to document its ongoing potential to fulfill its mission, accomplish its Core Theme objectives, and achieve the goals or intended outcomes of its programs and services, wherever offered and however delivered.

MSU Billings has employed well documented institutional and departmental strategic planning processes to regularly evaluate its overall institutional mission and the contributing divisional roles required to achieve that mission. The expiring strategic plan, FutureU, as well as the most recent work of the Community Taskforce each speak to the resources and capacity needed by the institution to achieve its goals and current core theme objectives as found in the MSU Billings' Year 7 Report. With a new strategic planning initiative underway at the institution, MSU Billings is poised to evaluate and document revisions to its core theme objectives and to assess the resources and capacity required to achieve intended outcomes through the effective delivery of programs and services provided by MSU Billings, wherever offered and however delivered.

> 5.B.2. The institution documents and evaluates regularly its cycle of planning, practices, resource allocation, application of institutional capacity, and assessment of results to ensure their adequacy, alignment, and effectiveness. It uses the results of its evaluation to make changes, as necessary, for improvement.

Through a report titled *2014-2015 Strategic Planning Committee Revisit*, the institution provides evidence that it has documented progress toward achieving the initiatives noted in the FutureU strategic plan. MSU Billings also provides evidence that it measures progress toward achieving the indicators of core theme attainment that were established by the institution. These institutional evaluations are sufficient that the university has been able to ensure that their planning, practices, resource allocation and employment of capacity are aligned with the strategic goals that MSU Billings has established for itself. However, because many of the institution's indicators of core theme attainment are not robust measures of successful outcomes, the institution has mostly not been able to utilize the results of its analyses to make improvements to the adequacy of its programs and services as effectively as it could have.

MSU Billings reports that a previous chancellor disrupted the execution of its FutureU plan, when in midstream execution of plan initiatives, the previous chancellor determined that the entire strategic plan needed to be revisited. While the evaluation team acknowledges that situations such as these may serve as a setback to an institution, moreover, a general lack of longevity with senior and mid-level administrators at MSU Billings for an extended period of time has most negatively impacted the institution's ability to achieve continuous improvement.

5.B.3. The institution monitors its internal and external environments to identify current and emerging patterns, trends, and expectations. Through its governance system it uses those findings to assess its strategic position, define its future direction, and review and revise, as necessary, its mission, Core Themes, Core Theme objectives, goals or intended outcomes of its programs and services, and indicators of achievement.

There is evidence that the institution monitors its internal and external environments and that it identifies emerging patterns and trends as well as expectations that its constituencies have of the institution. The university has developed a very recent awareness of external expectations through the work of the Community Taskforce, a group organized by the Board of Regents that included input from both internal and external interests of the university. The work of the Community Taskforce resulted in the development of the Five Pillars of success, which are intended to provide the institution with strategic guidance moving forward.

One substantial internal impact noted by the Community Taskforce includes instability of MSU Billings leadership, which was created by abnormally short tenures of many senior administrative positions over an extended period of time. One example of an external impact that MSU Billings has a clear understanding, is how low unemployment rates in Billings negatively affects student attraction and retention. During the Year 7 evaluation visit there were a number of examples provided by MSU Billings administration as well as others who spoke to various strategic opportunities available to MSU Billings. The institution also appears to have an awareness of obstacles that need to be addressed while bringing new strategic opportunities to fruition. However, within the context of the current accreditation cycle, the evaluation team does not feel that MSU Billing has demonstrated how their understanding of internal and external forces can be utilized to better define its strategic direction as it relates to mission and core themes.

Recommendations and Commendations
The evaluation team recommends the University:
1. Develop indicators of achievement that are meaningful, assessable, and verifiable that form the basis for evaluating accomplishment of the objectives of its Core Themes (1.B.2.).

2. Stabilize its administrative team to provide effective leadership and management for the institution's major support and operational functions and units to foster fulfillment of its mission (2.A.9.; 2.A.11.).

3. Review job descriptions to ensure they accurately reflect the duties, responsibilities, and authority of all positions, and evaluate if there is a sufficient number of qualified personnel to maintain its support operations (2.B.1.).

4. Use information gathered from monitoring its internal and external environments to inform and guide its strategic direction, including review and revision of its mission, core themes, core theme objectives, goals or intended outcomes of its programs and services, and indicators of achievement (5.B.3.).

The evaluation team commends MSU Billings as follows:
1. For the faculty and staff commitment to students and their perseverance in providing thoughtful, responsive, and innovative services and support throughout periods of instability in university leadership.

2. The extensive information made available to the University by its Institutional Research Department in an easily accessible format to facilitate decision-making on multiple levels.