

ADVANCING

Montana Technological University



VISION 2020-21

- Successfully navigate COVID-19
- Recruitment/student success
- Telling our story
- Positioning ourselves for the future



MONTANA
TECHNOLOGICAL UNIVERSITY

ROADMAP 2020-21

Completed:

- Return to face-to-face instruction and a healthy campus for FY21
- Launched a new brand
- Completed renovation of library auditorium
- Hired Vice Chancellor for Admin/Finance
- Developed a new strategic plan with mission, vision, values, and goals
- Developed strategic enrollment plan framework
- Hired dean of the College of Letters, Sciences & Professional Studies
- Recruited founding class of track & field student athletes
- Long range building plan approved for campus heating system upgrade
- Auxiliary gym referendum

In process:

- Campus master/space plan
- Highlands College reinvention
- Increase transfer student enrollment through enriched 2-year college transfer agreements
- Build out of academic advising/student success model
- Enhance business processes/applications through technology
- Complete construction of nursing simulation center
- Hire Vice Chancellor for Research/Dean of the Graduate School and Dean of Highland College
- Initiate new opportunities for faculty/staff professional development

Deliberately Distinct

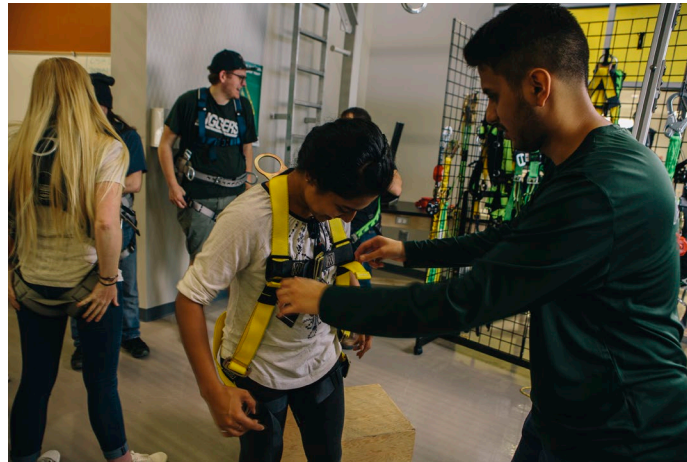
Founded in 1900 as the Montana State School of Mines, we offered degrees in mining and electrical engineering with a focus on mining and the processing of ore. Our mission expanded in the 1960s to include programs focused on the responsible development of natural resources and energy. Today, as Montana Technological University, we serve as Montana's only Special Focus science and engineering university. Throughout our journey, we have maintained our enthusiasm for hands-on learning and our heritage of work ethic, innovation, and opportunity.

Montana Tech is a place of purpose, home to uncommon thinking, teaching, research, innovation, and ideas. By embracing Montana as our living laboratory and emphasizing the value of experiential learning and community building, we offer a world-class education as a premier STEM university. We prepare graduates for careers in industry, energy, healthcare, and professional fields. What we do matters, today more than ever.

Deliberately Distinctive summarizes Montana Technological University's new strategic plan. This plan provides a platform for fulfilling our special focus to meet the needs of our students, the state of Montana, and humanity as a whole. With a long history of success, this plan not only positions us for the future, but accelerates our commitment to students, distinctive programs, and a robust and healthy campus culture.

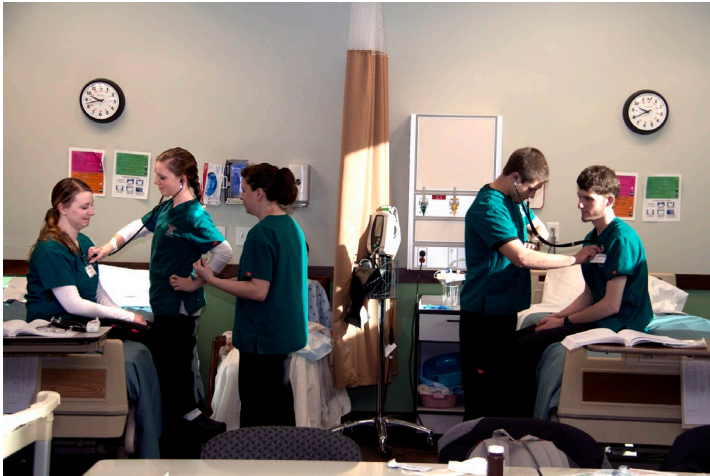
MISSION

As Montana's Special Focus Institution, Montana Technological University provides a transformative student experience by developing leaders and advancing science, engineering and technology, with the purpose of benefiting humanity while meeting the changing needs of society.



VISION

To be the institution of opportunity and innovation.



VALUES

- **Students** are the reason we exist. They are at the heart of all we do, and our commitment to providing them a transformational experience is unparalleled.
- **Diversity, equity, and inclusion** are part of who we are. People are our most important commodity, and we are steadfast in providing a fair and equitable community where all are valued.
- We are “**Determined Doers.**” Through collaboration, resolve, and fierce determination we value getting things done.
- **Hands-on, applied, and experiential learning** is in our DNA; it’s what we’re about! We provide a supportive and dynamic environment to ensure this is evident in all we do.
- **We embrace innovation, creativity, and forward-thinking.** We strive to create an environment where all will flourish.
- We are **one community devoted to excellence.**

GOALS

STUDENT SUCCESS

Decidedly distinctive, refreshingly affordable, and intentionally innovative, our robust academic programs, services, and learning environment position students at the center of all we do by focusing on accessibility, engagement, and employability from first impression through graduation and beyond.

PROGRAMS OF DISTINCTION

Deliberately committed to excellence in all programs, we provide transformational experiences in learning, research, and service through experiential learning, mentoring, community and industry engagement. We empower collaborative problem solvers, determined doers who make an impact in their profession and our world.

A HEALTHY AND VIBRANT CAMPUS ECOSYSTEM

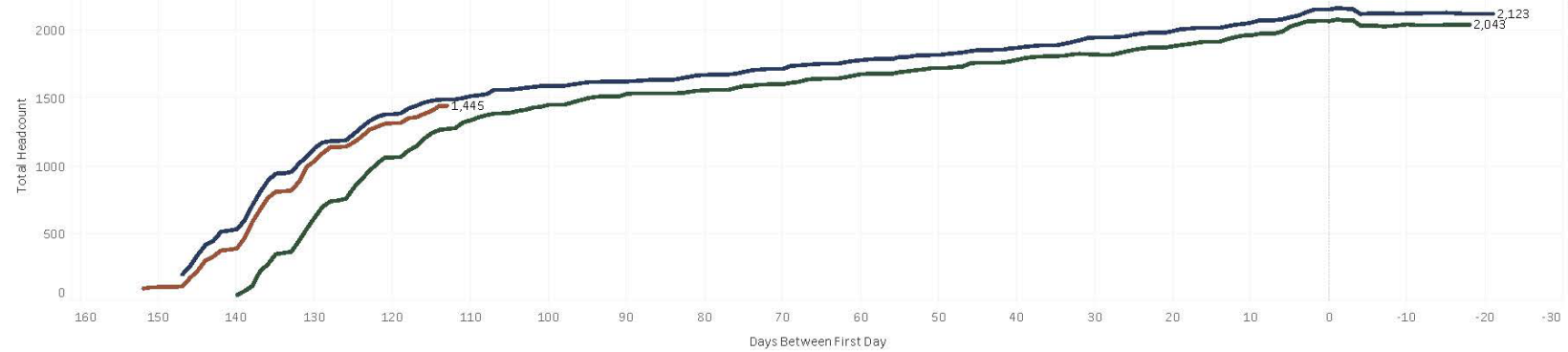
Opportunistic and innovative, we embrace our rich cultural heritage and abundant recreational environment to foster an inclusive and sustainable campus ecosystem. We provide exceptional service and invest in effective infrastructure that creates opportunities for social, intellectual, and professional growth.



ENROLLMENT UPDATES

Total Headcount and FTE Preregistered by Number of Days from First Day of School
(Through 15th Day of School)

Total Headcount

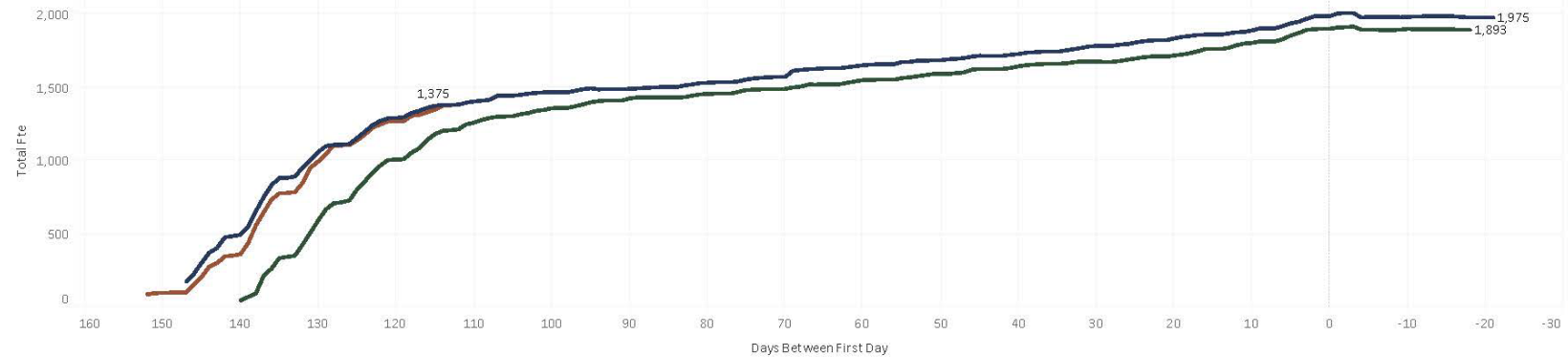


CAMPUS Bins
 Highlands College
 Montana Tech

TERM Bins
■ Fall 2019
■ Fall 2020
■ Fall 2021

MONTANA
TECHNOLOGICAL UNIVERSITY

Total FTE



First Day of School

Fall 2019
August 26, 2019

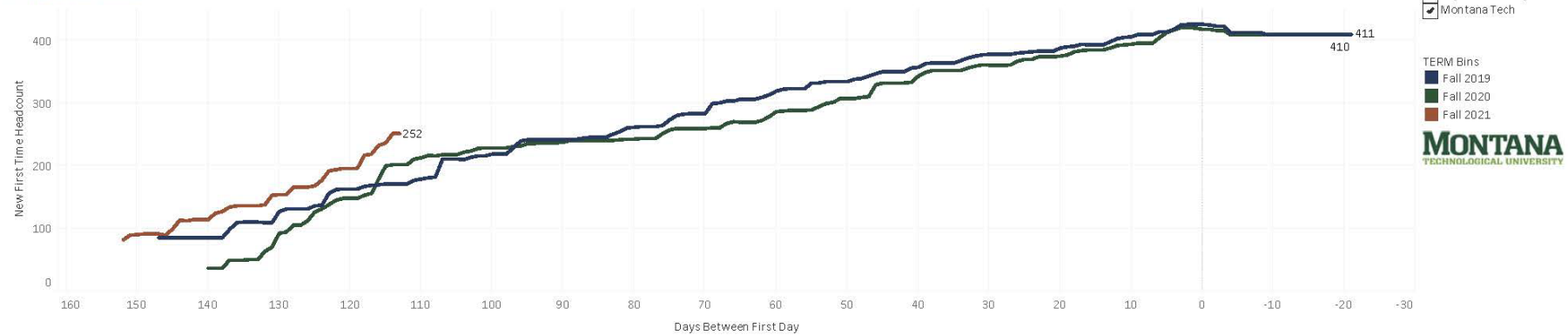
Fall 2020
August 17, 2020

Fall 2021
August 23, 2021

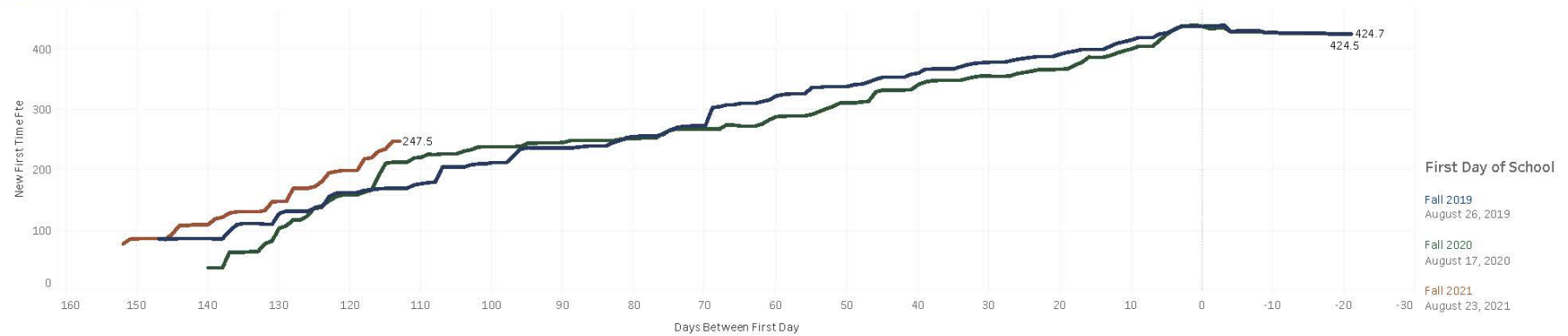
ENROLLMENT UPDATES

Total Headcount and FTE Preregistered by Number of Days from First Day of School
(Through 15th Day of School)

New First Time Headcount



New First Time FTE



Financial Results – March 2021

Montana Tech Current Unrestricted Revenues and Metrics

Revenue	Actual Results through Q3				
	FY17	FY18	FY19	FY20	FY21
State Support (base)	\$ 11,541,763	\$ 11,034,056	\$ 10,092,286	\$ 10,855,166	\$ 12,083,311
Tuition and Fees	\$ 18,363,160	\$ 16,649,330	\$ 16,388,542	\$ 14,948,323	\$ 13,911,669
Other Unrestricted Revenue	\$ 151,679	\$ 164,478	\$ 233,751	\$ (502,709)	\$ (228,743)
Grand Total	\$ 30,056,602	\$ 27,847,864	\$ 26,714,579	\$ 25,300,781	\$ 25,766,237
Student Headcount	2,708	2,512	2,446	2,356	2,243
Student FTE	2,364	2,247	2,118	1,995	1,853
Resident Students	1,766	1,651	1,609	1,529	1,468
Non-resident Students	598	596	509	466	385
Key Metrics					
State % Share	38%	40%	38%	43%	47%
State Support per Res FTE	\$ 6,536	\$ 6,683	\$ 6,272	\$ 7,100	\$ 8,231

- Tuition revenue is in line with expectations for the year and driven by the decrease in enrollment
- Overall outlook for the full year is closely aligned with the established budget and forecast

Financial Results – March 2021

Montana Tech Current Unrestricted Expenditures and Metrics

Expenditures	Actual Results through Q3				
	FY17	FY18	FY19	FY20	FY21
Instruction	\$ 14,413,937	\$ 14,217,866	\$ 13,463,790	\$ 12,879,285	\$ 12,235,024
Academic Support	\$ 1,837,717	\$ 1,315,928	\$ 1,369,992	\$ 1,204,339	\$ 1,462,569
Student Services	\$ 2,743,102	\$ 2,537,133	\$ 2,915,249	\$ 3,455,566	\$ 2,703,351
Institutional Support	\$ 1,777,209	\$ 1,934,802	\$ 1,794,410	\$ 2,115,636	\$ 1,738,216
Operation/Maintenance Plant	\$ 3,060,132	\$ 3,147,521	\$ 3,141,606	\$ 2,876,083	\$ 2,899,254
Research	\$ 93,067	\$ 97,322	\$ 111,659	\$ 63,216	\$ 64,004
Scholarships/Fellowships	\$ 375,203	\$ 420,128	\$ 392,755	\$ 2,394,635	\$ 2,958,522
Grand Total	\$ 24,300,368	\$ 23,670,699	\$ 23,189,462	\$ 24,988,760	\$ 24,060,941
Student Headcount	2,708	2,512	2,446	2,356	2,243
Student FTE	2,364	2,247	2,118	1,995	1,853
Key Metrics					
% Instruction Exp	59%	60%	58%	52%	51%
% Instruct/Acad/Stud Serv	78%	76%	77%	70%	68%
Expenditures per Student	\$ 10,280	\$ 10,532	\$ 10,949	\$ 12,524	\$ 12,984

- Unrestricted expenditures are also in line with expectations through the third quarter
- Variances in the financial results are, primarily, a product of the timing
- Outlook for the remainder of the year is in line with budget

CARES Act Impact

- To date Montana Tech has received 2 rounds of funding from the CARES Act
 - Direct support for our students – Total of **\$1.7M to date in cash payments made to students**
 - Expense reimbursement for mitigation – Total of **\$1.6M to date for testing, contact tracing and cleaning**
 - Other Infrastructure and Institutional support – Total of **\$1.8M to date for IT and service upgrades**
 - An additional \$5M is expected in the 3rd round of support for FY22; split between student and institutional support
- The use of CARES funds in FY21 helped Montana Tech to achieve a balanced budget without the use of reserve funds

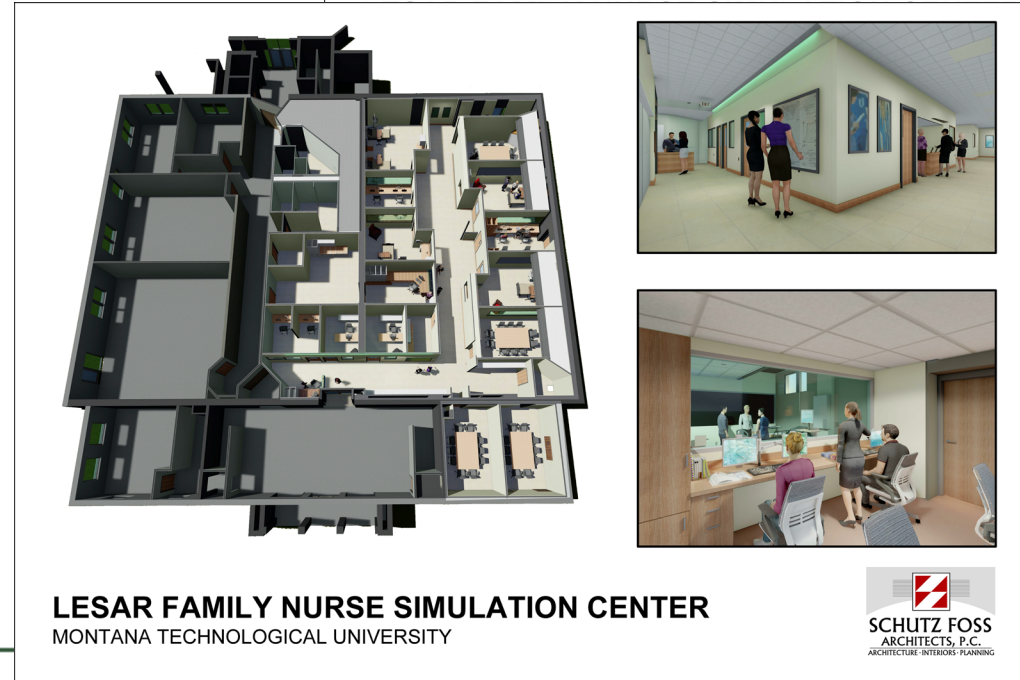
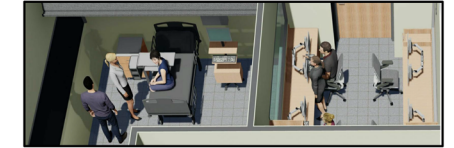
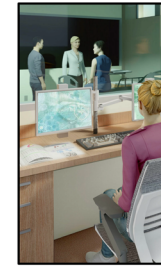
FY 22 Budget Outlook

Outlook for FY22

- Enrollment projected to improve, year over year, after 5+ years of decline
- Tuition rates remain unchanged for the next academic year
- Downward pressure on overall State Support
- Unrestricted revenue should increase from enrollment and can be supplemented, if needed, by the unused reserves
- Operating budgets from FY21 will be augmented with strategic investment for:
 - The return of pre-Covid activities, such as department travel and conference participation
 - The development of new services, offers or infrastructure to better position Montana Tech for the future

SUMMER PLANNING

- May Board of Regents meeting
 - HB 102
 - COVID-19 protocols/planning
 - Tuition and fees
- Nursing Simulation Center



LESAR FAMILY NURSE SIMULATION CENTER
MONTANA TECHNOLOGICAL UNIVERSITY



SCHUTZ FOSS
ARCHITECTS, P.C.
ARCHITECTURE INTERIORS PLANNING



SCHUTZ FOSS
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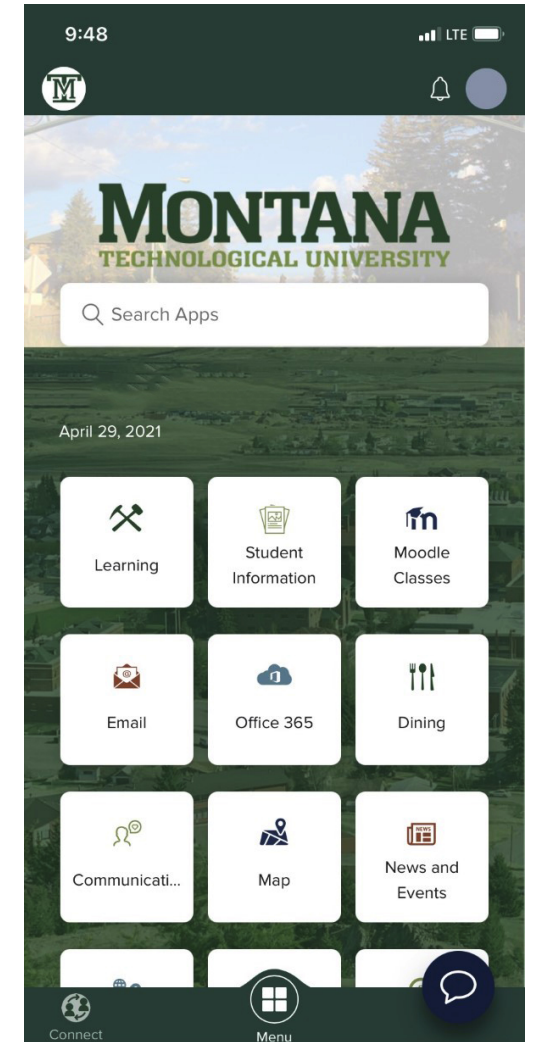
SUMMER PLANNING (cont)

- Dining Hall Renovation
- Amaresco lighting upgrade



SUMMER PLANNING (cont)

- New Digger Card with swipe access
- Continued campus refresh
- Technology upgrades





LET'S CELEBRATE!

Social immediately
following forum