

## Office of the Executive Vice President & Provost

### Organizational and staffing changes

#### Background

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In February 2018, President Bodnar charged the University Planning Committee with 1) developing a new UM mission, identity, and areas of excellence and 2) using existing centralized data to assess UM's academic programs. He used that input to produce his [draft recommendations](http://www.umt.edu/president/UM%20Strategy%20for%20Distinction%20StrategyforDistinctionDRAFT%204.17.18-2.pdf) ([http://www.umt.edu/president/UM%20Strategy%20for%20Distinction%20StrategyforDistinctionDRAFT 4.17.18-2.pdf](http://www.umt.edu/president/UM%20Strategy%20for%20Distinction%20StrategyforDistinctionDRAFT%204.17.18-2.pdf)), which he shared with campus on April 17.

Since the release of these draft recommendations, the campus community has provided extensive feedback on the recommendations' content and methodology. This feedback, especially as communicated through the Executive Committee of Faculty Senate, has resulted in revisions to both the recommendations for reorganization and the methodology for arriving at the faculty staffing levels that will best serve students across our programs.

The University Planning Committee, the Executive Committee of Faculty Senate, and the University Faculty Association have been critical partners in this important work, helping to revise the methodology and to ensure an accurate picture of our needs as well as a strategic approach to our decision making.

Below you will find:

- the timeline for instructional staffing planning
- information on the data used in determining instructional staffing budget targets
- feedback on the President's draft recommendations released April 2018
- a set of communications related to this initiative outlining process, strategy, and next steps

#### Timeline for instructional staffing planning

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| Date           | Action  |
|----------------|---|
| Sept. 26, 2018 | <a href="#">Instructional staffing budget targets provided to Deans and Chairs (../docs/UMInstrTgts2021.pdf)</a>  |
| Oct. 12, 2018  | Deadline for faculty to submit <a href="#">Voluntary End of Employment Agreement (facagreemts.php)</a> , <a href="#">Voluntary FTE Reduction Agreement (facagreemts.php)</a> , and <a href="#">Post Sabbatical Separation from Employment Agreement (facagreemts.php)</a> . |
| Oct. 26, 2018  | Deans submit recommendations for achieving unit instructional staffing budgets to the Provos<br>Any curricular impact items from staffing plans go to Faculty Senate for review   |
| Nov. 5, 2018   | President forms Review Committee (CBA 18.530) if needed for retrenchment  |
| Dec. 20, 2018  | Faculty Senate provides recommendations to President on curricular impact items from staffing plans   |
| Jan. 15, 2019  | Review Committee provides report to President, if needed  |
| March 8, 2019  | Board of Regents considers retrenchment plan, if needed, and any curricular and organizational changes requiring approval   |

#### Data used in determining instructional staffing budget targets

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In his [memo dated Aug. 17 \(../docs/harbormem009InstStaffPlans.pdf\)](#), Provost Harbor requested that department chairs and deans provide feedback on student credit hour (SCH) and faculty FTE metrics. The UM Data Office made changes per the feedback received, and then recalculated the SCH-FTE ratios used to determine the presumptive staffing levels for tenure-track and non-tenurable faculty.

The presumptive staffing levels were then multiplied by the average salary for tenure-track faculty and the salary floor for non-tenurable faculty, respectively, to calculate presumptive instructional budgets for each department. Provost Harbor then adjusted those amounts based on strategic considerations to determine the final instructional staffing budget targets.

This spreadsheet, as well as the changes requested by the academic units about the data, are available below:

[Presumptive instructional budget metrics \(../docs/InstructionalStaffingLevels\\_PresumptiveBudgetMetricsSept2018.xlsx\)](#)

[Corrections requested by academic units \(../docs/Corrections.pdf\)](#)

In addition, here is a link to the instructional staffing budget targets document that includes notes on strategic priorities:

[Instructional staffing budget targets with notes \(../docs/UMInstructionalTargets2021\\_notes.pdf\)](#)

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## Feedback

The UM community provided hundreds of points of feedback on President Bodnar's [draft recommendations \(http://www.umt.edu/president/UM%20Strategy%20for%20Distinction%20StrategyforDistinctionDRAFT\\_4.17.18-2.pdf\)](#).

The Office of the Provost collected all the feedback that was submitted online as well as feedback that was emailed directly to the President and Provost. Below are links to an executive summary of this feedback as well as all the feedback received.

[Executive summary \(../docs/SummaryFeedback.pdf\)](#)

<http://www.umt.edu/planningassessmentcontinuum/Planning/files/fall18docs/SummaryFeedback.pdf>

[Feedback \(../docs/AllFeedback.pdf\)](#)

<http://www.umt.edu/planningassessmentcontinuum/Planning/files/fall18docs/AllFeedback.pdf>

Faculty Senate collected feedback as well. Below you will find a link to a summary of feedback developed by the Executive Committee of the Faculty Senate (ECOS), as well as a memo from ECOS to the UPC.

[ECOS summary of feedback \(../docs/ECOSsummary.pdf\)](#)

[ECOS memo to UPC \(../docs/ECOS\\_memo\\_UPC.8.5.18.pdf\)](#)

[http://www.umt.edu/planningassessmentcontinuum/Planning/files/fall18docs/ECOS\\_memo\\_UPC.8.5.18.pdf](http://www.umt.edu/planningassessmentcontinuum/Planning/files/fall18docs/ECOS_memo_UPC.8.5.18.pdf)

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## Communications and next steps

[Oct. 4 email from Provost Harbor re: Instructional staffing.planning update: new options available and data release \(../docs/oct4email.php\)](#)

[Sept. 27 memo from Provost Harbor to ASUM and GPSA leaders \(../docs/sept27asumgpsa.php\)](#)

[Sept. 26 memo from Provost Harbor on Budget Targets for Instructional Staffing Plans \(../docs/harbormem018InstructionalStaffingBudgetTargets.pdf\)](#)

[Sept. 21 email from Provost Harbor to UM faculty re: Voluntary End of Employment Agreement \(../docs/Sept21email.php\)](#)

[Sept. 14 email from Provost Harbor re: UM organizational proposals and instructional staffing under discussion \(../docs/Sept14email.php\)](#)

[Sept. 9 working draft from Provost Harbor to ECOS on revised reorganization of academic programs \(../docs/RevReorgDraft.pdf\)](#)

[Aug. 29 email from Provost Harbor on Instructional Staffing.planning.process \(../docs/Aug29email.php\)](#)

[Aug. 17 memo from Provost Harbor on Instructional Staffing Plans \(../docs/harbormem009InstStaffPlans.pdf\)](#)

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