

ADVANCING

Montana Technological University



October 15, 2020



VISION 2020-21

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

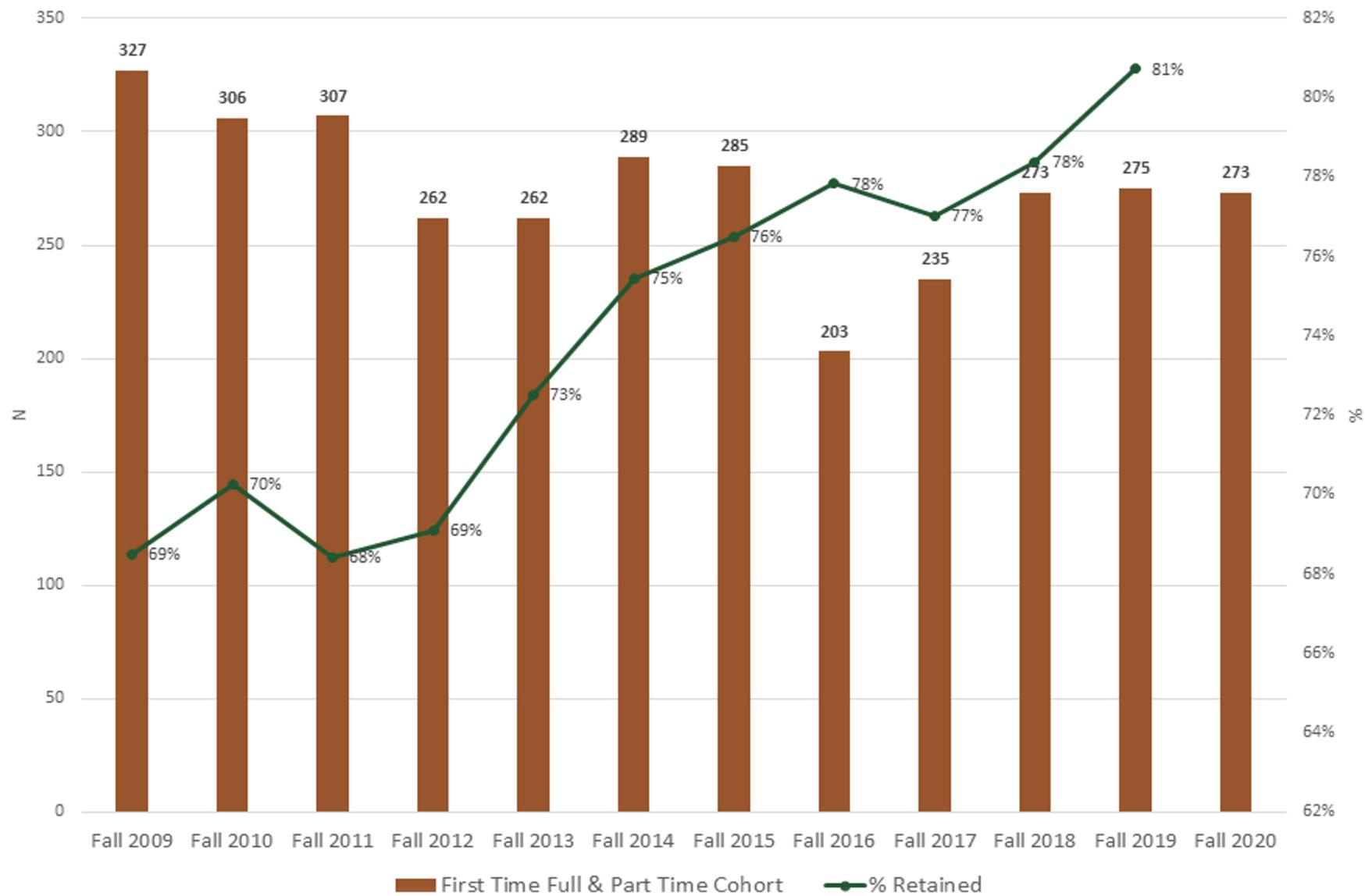
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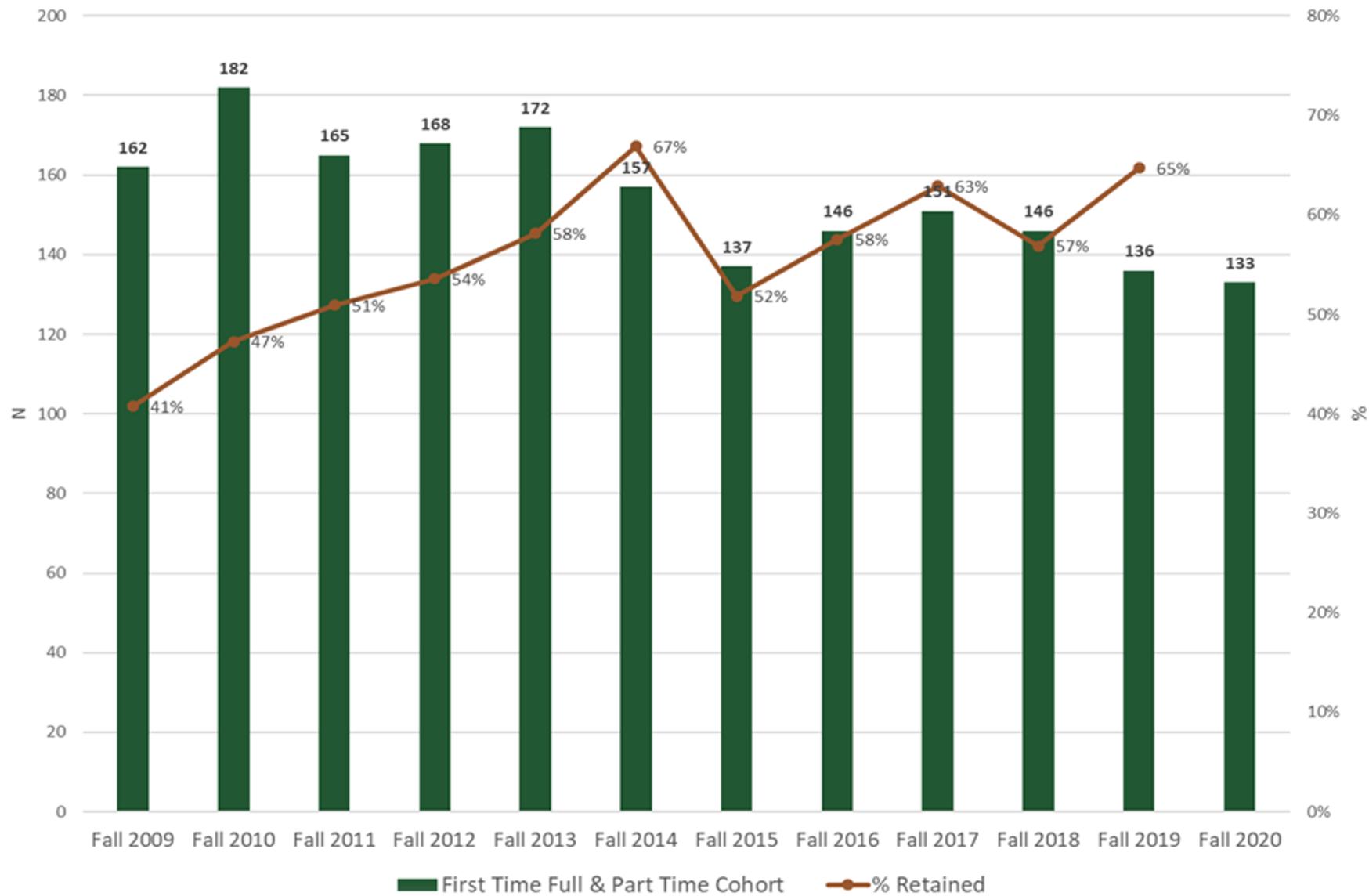
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North Campus Cohort Size and 2nd Fall Retention



Highlands College Cohort Size and 2nd Fall Retention



Fall Enrollment

Overall FTE Enrollment down 81 students (new and continuing) = 4%

Headcount by college:

	2013	2014	2015	2016	2017	2018	2019	2020	2020 2019
College of Letters, Sciences, and Professional Studies	632	595	575	593	559	610	589	587	(2)
Graduate School	161	192	205	210	246	247	218	216	(2)
Highlands	628	569	549	473	456	413	376	337	(39)
Non Degree	309	316	328	322	336	338	343	358	15
School of Mines & Engineering	1193	1273	1323	1211	1081	975	895	831	(64)
TOTAL	2923	2945	2980	2809	2678	2583	2421	2329	(92)

Other Achievements

- New in-state students are up
- Number of new females increased both in- and out-of-state
- New first-time students flat with last year

Other News From the Admissions & Enrollment Management Department

- Applications for Fall 2021 are up
- Adapting recruitment strategies to COVID-19
- Building partnerships with 2-year schools
- Continued work with RNL on the Recruitment Plan and Strategic Enrollment Plan
- New scholarship model/process: True Cost Calculator
- Implementing DegreeWorks Spring 2021

BUDGET UPDATE



FY 2021 Budget

- Uncertainties due to COVID-19
- FY 21 Enrollment projected to be down 6% of FY 20 Actual Enrollment
- FY 21 Budget \$630,000 less than our FY 20 Budget
- FY 21 Revenue Includes-
 - \$850,000 Revolving Reserve Account
 - \$200,000 CARES funding – Summer Tuition Student Discount
- Fall Tuition Revenue is within \$28k of Projected \$6.7M

Montana Technological University

Current Unrestricted Budget

REVENUE	FY17	FY18	FY19	FY20	FY21 Budget	Difference	
						1 Yr	5 Yr
State Support	\$15,924,638	\$15,171,959	\$15,244,296	\$15,639,208	\$15,971,359	2%	0%
State Support (OTO)				\$82,155	\$0		
Net Tuition Revenue	\$16,207,814	\$14,559,996	\$14,075,856	\$12,727,415	\$11,172,588	-12%	-31%
Transfers/Other	\$733,319	\$966,942	\$984,013	\$772,937	\$1,866,847	142%	155%
Total Operating Revenue	\$32,865,771	\$30,698,897	\$30,304,165	\$29,221,715	\$29,010,794	-1%	-12%
Scholarships/Discounts/Waivers	\$2,040,124	\$2,018,345	\$2,227,644	\$2,131,685	\$2,513,363		
Total Current Unrestricted	\$34,905,895	\$32,717,242	\$32,531,809	\$31,353,400	\$31,524,157		
Student FTE	2,510	2,309	2,178	2,031	1,918	-6%	-24%
Resident Students	1,812	1,732	1,644	1,581	1,537	-3%	-15%
Non-resident Students	698	577	534	450	381	-15%	-45%

Coronavirus Aid, Relief and Economic Security (CARES) Act Funding

US Department of Education

Emergency Relief Funds – Students	838,100	
Emergency Relief Funds – Institution		838,099
Emergency Relief Funds – Strengthening Institution	<u>83,815</u>	
TOTAL DOEd		\$1,760,014

Governor’s Coronavirus Relief Funds

Mitigation and Monitoring	<u>1,618,580</u>	
TOTAL GCRF		\$1,618,580

Governor’s Education Emergency Relief Funds

1-2-Free (Dual Credit)		101,722
Workforce Development		15,000
Technology		<u>100,000</u>
TOTAL GEER		\$216,722

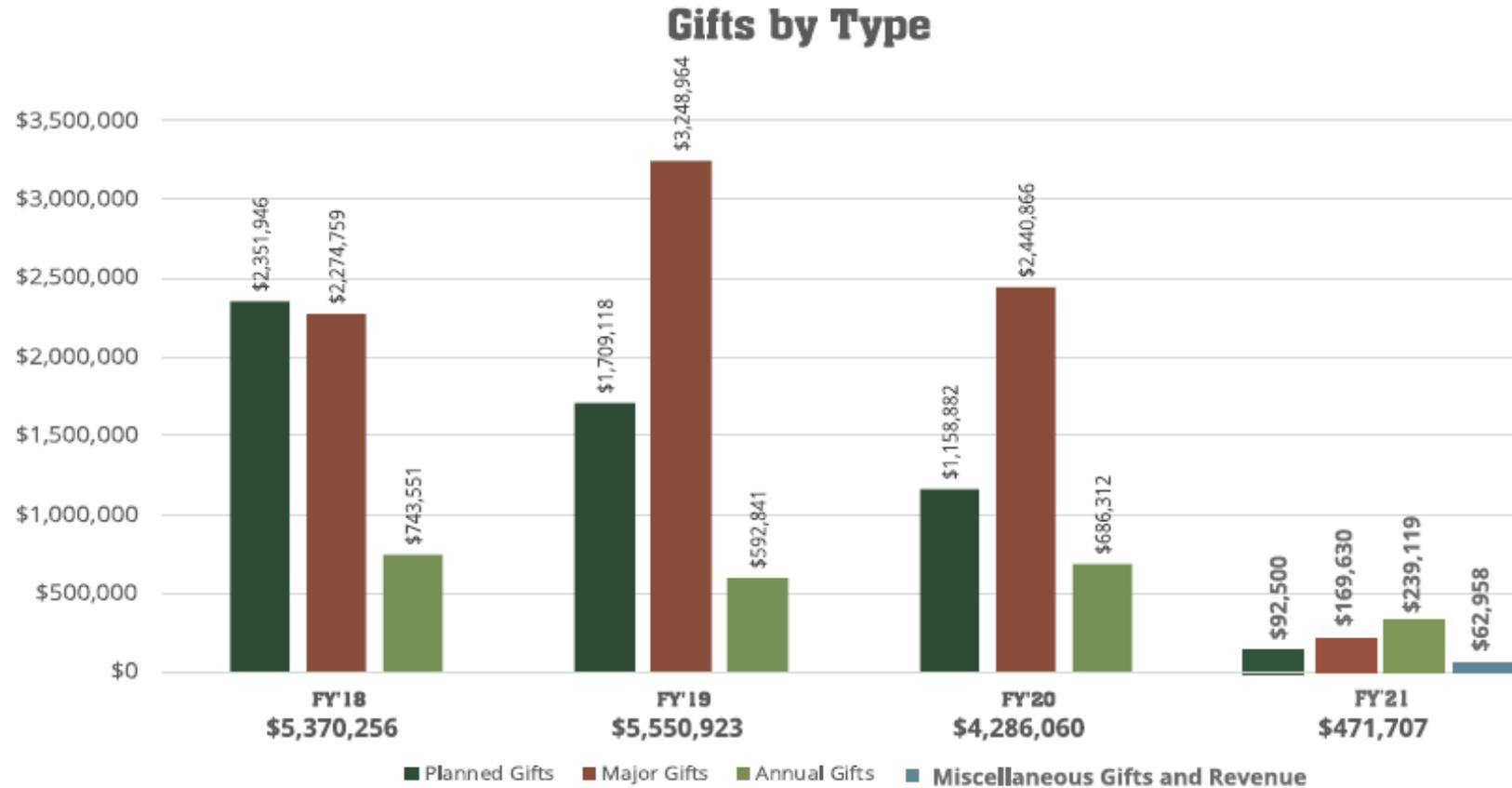
Grant Data

- FY19: 113 proposals submitted, 63 funded for \$8 million
- FY20: 127 proposals submitted, 68 funded to date for \$12.1 million [many still under review]
- FY21: 22 proposals submitted in the first 3 months; 7 funded for \$114 K

More than 75 faculty, MBMG, and staff prepared these proposals.
Congratulations all!

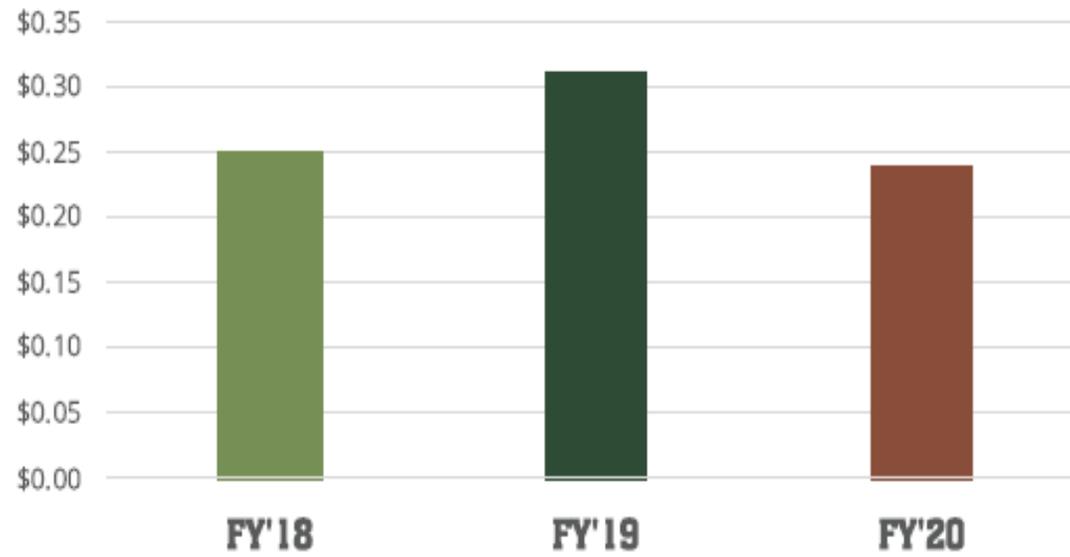
Development & Alumni Engagement

Montana Technological University Foundation Performance Management



Investment to Raise a Dollar

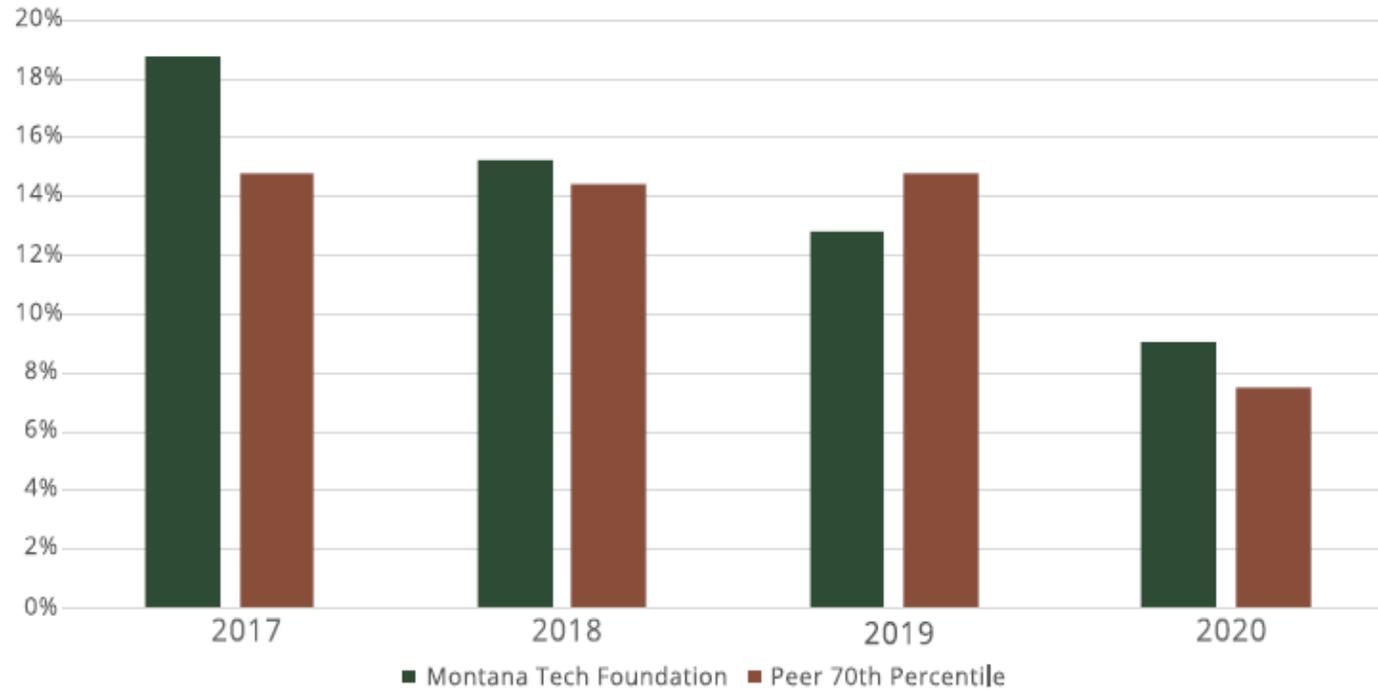
Total Expenses/Net Contributions



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Donor Aquisition

Gave first gift, or again after five years, during the selected year

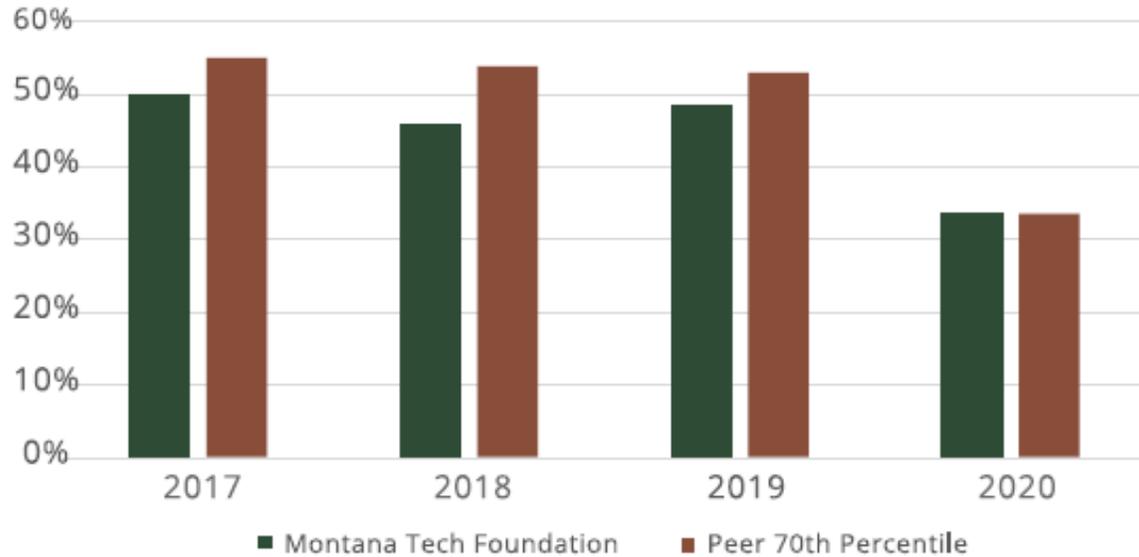


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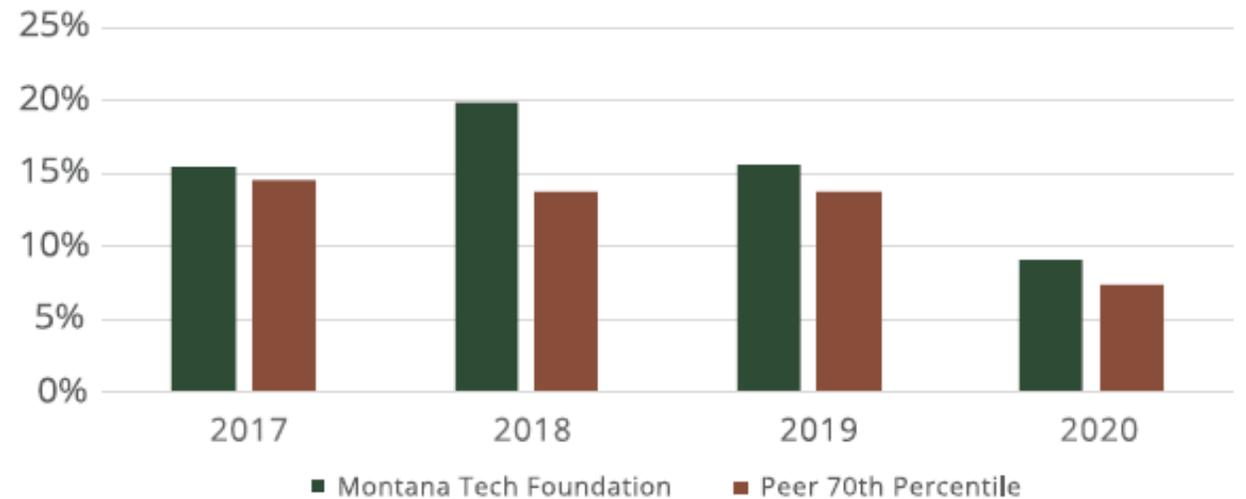
Donor Retention

Gave during the selected year and its previous year



Recapture

Gave during the selected year and two-to-five years prior



Summer/Fall Initiatives of Emphasis

Strategic Initiatives

Implement Prospect Management System

Implement Communication & Engagement Plan

Alignment of Outreach/Engagement, Governance

Strategic Initiatives

Implement Prospect Management System

Grow Montana Tech's annual, major, principal and planned giving performance over the next five years. Create metrics to measure the Office of Development and Alumni Relations.

Action Steps



Implement Communication & Engagement Plan

Grow the culture of philanthropy. Expand engagement with external constituencies and key campus stakeholders and partners.

Action Steps



Alignment of Outreach/Engagement, Governance

Realign development and alumni functions. Retool and modernize foundational documents and structures. Act as prudent fiduciaries of all entrusted funds.

AGB = Association of Governing Boards of Colleges and Universities

EAB = Educational Advisory Board

Action Steps



Strategic Plan Goals

Goal: Grow Giving Pipelines, Participation and Funds Raised

- Implement **Blackbaud Fundraiser Performance Management (FPM)** & Metrics
- Develop and Implement Proposal System
- Forecast pipeline revenue
- Capture and record all substantive constituent interactions

Goal: Culture of Philanthropy through Energized Engagement Plan

- Increase ratio of touches to asks
- Increase quality of, acquire more contact data
- Build & implement a robust stewardship plan
- Organize and offer campus engagement retreat
- Implement **Overture** (digital engagement platform)
- Redo **Office of Development and Alumni Engagement (OD&AE)** Website
- More frequent and useful communication of development results with campus

Goal: Exceptional Infrastructure

- Restructure and rebrand as **OD&AE**
- Consult with **AGB** & **EAB** to potentially provide process review, best practices and development opportunities for board, **Montana Tech Alumni Association**, campus & staff
- Engage, support, energize and better connect and leverage alumni chapters
- Robust review and re-tool of foundational documents

Our Charge: Providing You Service, Advancing Campus

All of our work and the initiatives we pursue align with the **overall broader strategic objectives of the campus** to empower the team to:

- Drive recruitment, retention and overall enrollment
- Increase access by lowering financial barriers, including student debt
- Create a student-centered ethos
- Maintain excellence in education and the student experience
- Develop a sustainable culture of philanthropy

Recent Successes

Completed Montana Access matching campaign

- Fully-leveraged state match

Flexible student-focused funds in time of crisis

- Kasperick Student Emergency Fund
- Tech Vision Scholarship

DayOne Giving Day

- \$200,000 raised from 726 Gifts
 - 73% growth in donors
 - 21% growth in dollars
- Primary donor acquisition vehicle
- Growth in ambassadorship, donor-provided matching opportunities, campus participation

Annual Scholarship Match Secured

- 5-year/\$80,000 per year principal gift commitment

Initiatives: Underway & Upcoming

Scholarship Match Challenge

- Drives enrollment, increases access
- Empowers recruiting team
- Drives annual giving, stretch and major gifts
- Incentivizes first-time donors

Be the First Initiative: \$250,000

- Local, first-generation students
- Featured during DayOne
- Message featuring CGA/MT Tax Credit

Nursing Simulation Center

Outreach, Marketing and Student Experience Initiatives

On the Horizon

- Strategic Plan



Thank You