VISION 2020-21

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

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

Headcount by college:

<table>
<thead>
<tr>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>632</td>
<td>595</td>
<td>575</td>
<td>593</td>
<td>559</td>
<td>610</td>
<td>589</td>
<td>587</td>
<td>(2)</td>
<td></td>
</tr>
<tr>
<td>Graduate School</td>
<td>161</td>
<td>192</td>
<td>205</td>
<td>210</td>
<td>246</td>
<td>247</td>
<td>218</td>
<td>216</td>
<td>(2)</td>
<td></td>
</tr>
<tr>
<td>Highlands</td>
<td>628</td>
<td>569</td>
<td>549</td>
<td>473</td>
<td>456</td>
<td>413</td>
<td>376</td>
<td>337</td>
<td>(39)</td>
<td></td>
</tr>
<tr>
<td>Non Degree</td>
<td>309</td>
<td>316</td>
<td>328</td>
<td>322</td>
<td>336</td>
<td>338</td>
<td>343</td>
<td>358</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>School of Mines &amp; Engineering</td>
<td>1193</td>
<td>1273</td>
<td>1323</td>
<td>1211</td>
<td>1081</td>
<td>975</td>
<td>895</td>
<td>831</td>
<td>(64)</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>2923</td>
<td>2945</td>
<td>2980</td>
<td>2809</td>
<td>2678</td>
<td>2583</td>
<td>2421</td>
<td>2329</td>
<td>(92)</td>
<td></td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>REVENUE</th>
<th>FY17</th>
<th>FY18</th>
<th>FY19</th>
<th>FY20</th>
<th>FY21</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1 Yr</td>
<td>5 Yr</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Support</td>
<td>$15,924,638</td>
<td>$15,171,959</td>
<td>$15,244,296</td>
<td>$15,639,208</td>
<td>$15,971,359</td>
<td>2% 0%</td>
</tr>
<tr>
<td>State Support (OTO)</td>
<td>$16,207,814</td>
<td>$14,559,996</td>
<td>$14,075,856</td>
<td>$12,727,415</td>
<td>$11,172,588</td>
<td>-12% -31%</td>
</tr>
<tr>
<td>Net Tuition Revenue</td>
<td>$733,319</td>
<td>$966,942</td>
<td>$984,013</td>
<td>$772,937</td>
<td>$1,866,847</td>
<td>142% 155%</td>
</tr>
<tr>
<td>Transfers/Other</td>
<td>$2,040,124</td>
<td>$2,018,345</td>
<td>$2,227,644</td>
<td>$2,131,685</td>
<td>$2,513,363</td>
<td>-6% -24%</td>
</tr>
<tr>
<td>Scholarships/Discounts/Waivers</td>
<td>$2,040,124</td>
<td>$2,018,345</td>
<td>$2,227,644</td>
<td>$2,131,685</td>
<td>$2,513,363</td>
<td>-6% -24%</td>
</tr>
<tr>
<td>Total Operating Revenue</td>
<td>$32,865,771</td>
<td>$30,698,897</td>
<td>$30,304,165</td>
<td>$29,221,715</td>
<td>$29,010,794</td>
<td>-1% -12%</td>
</tr>
<tr>
<td>Total Current Unrestricted</td>
<td>$34,905,895</td>
<td>$32,717,242</td>
<td>$32,531,809</td>
<td>$31,353,400</td>
<td>$31,524,157</td>
<td>-6% -24%</td>
</tr>
<tr>
<td>Student FTE</td>
<td>2,510</td>
<td>2,309</td>
<td>2,178</td>
<td>2,031</td>
<td>1,918</td>
<td>-3% -15%</td>
</tr>
<tr>
<td>Resident Students</td>
<td>1,812</td>
<td>1,732</td>
<td>1,644</td>
<td>1,581</td>
<td>1,537</td>
<td>-15% -45%</td>
</tr>
<tr>
<td>Non-resident Students</td>
<td>698</td>
<td>577</td>
<td>534</td>
<td>450</td>
<td>381</td>
<td>-15% -45%</td>
</tr>
</tbody>
</table>
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: 83,815
  TOTAL DOEd: $1,760,014

Governor’s Coronavirus Relief Funds
- Mitigation and Monitoring: 1,618,580
  TOTAL GCRF: $1,618,580

Governor’s Education Emergency Relief Funds
- 1-2-Free (Dual Credit): 101,722
- Workforce Development: 15,000
- Technology: 100,000
  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

Gifts by Type

FY'18: $5,370,256
- Planned Gifts: $2,251,596
- Major Gifts: $2,774,759
- Annual Gifts: $1,131,401
- Miscellaneous Gifts and Revenue: $8,684

FY'19: $5,550,923
- Planned Gifts: $3,215,564
- Major Gifts: $1,725,118
- Annual Gifts: $525,841
- Miscellaneous Gifts and Revenue: $1,495

FY'20: $4,286,060
- Planned Gifts: $4,400,866
- Major Gifts: $1,158,822
- Annual Gifts: $893,312
- Miscellaneous Gifts and Revenue: $239,119

FY'21: $471,707
- Planned Gifts: $92,500
- Major Gifts: $169,630
- Annual Gifts: $239,119
- Miscellaneous Gifts and Revenue: $62,558
Donor Acquisition

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

- 2017
- 2018
- 2019
- 2020

- Montana Tech Foundation
- Peer 70th Percentile
Summer/Fall Initiatives of Emphasis

Strategic Initiatives

- Implement Prospect Management System
- Implement Communication & Engagement Plan
- Alignment of Outreach/Engagement, Governance
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 Ovrture (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

Montana Technological University
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