

Peer Evaluation  
Montana State University Billings (MSUB)  
Year Seven Ad Hoc Report

Northwest Commission on Colleges and Universities

Virtual Site Visit: 29 April 2020

Prepared by:  
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## Overview

Following the Fall 2018 Year Seven Mission Fulfillment and Sustainability Evaluation, the Northwest Commission on Colleges and Universities provided four recommendations to Montana State University Billings (MSUB) in their letter of 18 January 2019. Those recommendations are listed below. Recommendations One and Three were continued from the MSUB Fall 2013 Year Three Peer Evaluation Report and were areas in which MSUB was considered out of compliance. Recommendations Two and Four were new and were areas in which MSUB was substantially in compliance but in need of improvement. MSUB was asked to respond to Recommendations One and Three in the Spring 2020 Ad Hoc Report and to Recommendations Two and Four in the Fall 2021 Mid-Cycle Evaluation Report. MSUB addressed all four recommendations in its Spring 2020 Ad Hoc Report.

- *Recommendation One: Develop indicators of achievement that are meaningful, assessable, and verifiable that form the basis for evaluating accomplishment of the objectives of its Core Themes (2010 Standard 1.B.2).*
- *Recommendation Three: Ensure the University is addressing human resource issues that have been highlighted previously as needing attention, including issues related to duties, responsibilities, and authority of all positions, and evaluate if there is a sufficient number of qualified personnel to maintain its support operations (2010 Standard 2.B.1).*
- *Recommendation Two: (Revised) Demonstrate a commitment to stabilize its administrative team and provide effective leadership and management, with appropriate levels of responsibility and accountability, for the major support and operational functions and units to foster fulfillment of its mission (2010 Standards 2.A.9, 2.A.11).*
- *Recommendation Four: Develop a plan to monitor its internal and external environments and 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 (2010 Standard 5.B.3).*

On behalf of the Northwest Commission on Colleges and Universities (NWCCU), the peer evaluator reviewed MSUB's 2013 Year Three Peer Evaluation Report; the 2018 Year Seven Peer Evaluation Report; and the 2020 Year Seven Ad Hoc Report and supporting documentation. A virtual site visit was conducted on 29 April 2020. The peer evaluator is grateful to the MSUB community for the time and energy devoted to preparing a very thorough and exceedingly well-documented Ad Hoc Report and for the authenticity and responsiveness of the 22 faculty, staff, and administrators who met with the peer evaluator during the virtual site visit. Appendix A provides the site visit itinerary.

This peer evaluation recommends the Commission find that MSUB has addressed Recommendations One and Three and should be considered in compliance with the NWCCU Standards. In addition, this peer evaluation recommends the Commission find that MSUB has made significant improvements in the areas delineated in Recommendations Two and Four. In light of the COVID-19 challenges all institutions of higher education are confronting now and for the foreseeable future, this peer evaluation suggests MSUB provide a brief update on Recommendations Two and Four in its Fall 2021 Mid-Cycle Evaluation. In keeping with the MSUB Year Seven Ad Hoc Report, this peer evaluation first addresses Recommendations One and Three and then provides responses to Recommendations Two and Four below.

## Recommendation One

*Develop indicators of achievement that are meaningful, assessable, and verifiable that form the basis for evaluating accomplishment of the objectives of its Core Themes (2010 Standard 1.B.2).*

In its Year Seven Ad Hoc Report, MSUB provided a very thorough description of the process undertaken to develop meaningful, assessable, and verifiable indicators of core theme achievement. MSUB started this process about two months prior to the Fall 2018 Year Seven visit and has made extensive progress to date. This peer evaluation finds particularly impressive the strategies MSUB employed to involve the university community in the process that culminated in the MSUB “Students First” Strategic Plan 2019-2026. Those strategies included the following:

- Establishment of a broadly representative working group comprised of students, staff, faculty, and foundation and community members involving academics; finance, administration, and facilities; student services; communications and marketing; athletics; eLearning; data services; alumni; and surrounding communities
- Use of an external consultant to meet with each MSUB Cabinet member and to facilitate a strategic planning retreat and brainstorming session including the Cabinet and strategic planning working group members
- Drafting of multiple mission and vision statements that were shared with the MSUB community for feedback and the facilitation of follow-up open forums to discuss feedback reports
- Consultation of guiding documents during the drafting of core themes including the Montana University System 2018 Strategic Plan; the MSU Bozeman 2019 Strategic Plan; the MSUB 2018 Community Task Force Plan; Fall 2018 summaries of MSUB strategic planning group sessions; the 2018 MSUB Chancellor’s First-Year Goals; 2018 MSUB Holistic Enrollment and Retention Committee (HERC) documents; and previous MSUB strategic plans
- Creation of a one-page strategic plan framework delineating MSUB’s four core themes; five objectives; and 20 sub-objectives:
  - Theme I: Build educational programs to support student needs.
    - Objective 1 – Educate: ensure a high level of effective teaching and learning across the curriculum.

- Theme II: Progressively grow the university.
  - Objective 2 – Recruit/Retain: develop and recruit a vibrant and diverse academic community of students, faculty, and staff.
- Theme III: Strengthen relationships with the community to enhance partnership opportunities.
  - Objective 3 – Partnership: develop and enhance public-private partnerships at the local and regional levels.
- Theme IV: Unify, invigorate, and engage MSUB’s structure and culture.
  - Objective 4 – University Foundations: stimulate student success by enhancing campus facilities and services to effectively support academic and co-curricular programs.
  - Objective 5 – Stewardship: be responsible stewards of resources and foster a culture of collaboration.
- Establishment of five strategic planning committees – one for each objective
- Peer mentoring from Southern Utah University’s (SUU) Assistant to the President for Institutional Effectiveness including discussions with each strategic planning committee about developing metrics to measure progress toward, and achievement of, the 20 sub-objectives – and a follow-up visit by MSUB Office of Institutional Research staff members to SUU
- Drafting of outcomes, metrics, and action plans by the strategic planning committees
- Inclusion of additional colleagues in the strategic planning process in September 2019 and the establishment of new leads for each sub-objective
- Creation of action plans for each sub-objective aligned to a strategic plan timeline
- Ongoing development of data dashboards to reflect the progress of those action plans and related data collection and analyses
- Development of a template to guide unit-level strategic planning

The MSUB “Students First” Strategic Plan 2019-2016 presents clear core themes, objectives, sub-objectives, desired outcomes, and specific metrics for the measurement of those outcomes and documentation of outcome, sub-objective, and objective achievement. These metrics – and their alignment to the outcomes, sub-objectives, and objectives – are meaningful, assessable, and verifiable indicators of core theme achievement. Given all of the above; the extensive documentation provided in the MSUB Year Seven Ad Hoc Report; and discussions during the virtual site visit with all objective leads and 14 sub-objective leads, the Accreditation Liaison Officer, and the Director of Institutional Research, this peer evaluation recommends the Commission find MSUB in compliance with 2010 Standard 1.B.2.

### Recommendation Three

*Ensure the University is addressing human resource issues that have been highlighted previously as needing attention, including issues related to duties, responsibilities, and authority of all*

*positions, and evaluate if there is a sufficient number of qualified personnel to maintain its support operations (2010 Standard 2.B.1).*

The MSUB Year Seven Ad Hoc report provides a summary of the process undertaken to review and revise, as necessary, all existing job descriptions and to create job descriptions for positions where none were on file. The peer evaluator was also provided online access to job descriptions for the Chancellor, the Provost and Vice Chancellor for Academic Affairs, the Vice Chancellor for Student Access and Success (Student Affairs), and the Vice Chancellor for Administration and Finance – and for positions reporting to these administrators as follows:

- Staff members reporting to the Chancellor in the following areas:
  - Athletics
  - the Chancellor’s Office – Executive Assistant
  - University Communications and Marketing
  - Yellowstone Public Radio
  
- Staff members reporting to the Provost and Vice Chancellor for Academic Affairs in the following areas:
  - City College
  - College of Business
  - College of Education
  - College of Health Professions and Science
  - College of Liberal Arts and Social Sciences
  - Graduate Studies
  - Academic Senate
  - Academic Support
  - Accreditation and Assessment Planning
  - Advising and Career Services
  - the Provost’s Office – Associate Provost
  - Disability Support
  - E-Learning
  - Grants and Sponsored Programs
  - Institutional Research
  - International Studies and Outreach and the Office of International Studies
  - Library
  - Montana Center for Inclusive Education
  - Native American Achievement Center
  - Records and Registrar
  - TRiO Student Support Services
  - Note: the peer evaluator did not view job descriptions for the Budget Analyst and Strategic Planning; the Executive Assistant; or the University Honors Program.
  
- Staff members reporting to the Vice Chancellor for Student Access and Success in the following areas:

- Admissions
  - Associated Students of MSUB
  - Center for Engagement
  - Financial Aid and Scholarships
  - Housing and Residential Life
  - Jacket Student Central
  - Office of the Vice Chancellor for Student Affairs – Administrative Associate
  - New Student Services
  - Student Engagement
  - Student Health Services
  - Upward Bound
  - Note: the peer evaluator did not view job descriptions for the Military and Veterans Success Center.
- Staff members reporting to the Vice Chancellor for Administration and Finance in the following areas:
    - Business Services
    - Campus Store
    - Facilities Services
    - Financial Services
    - Human Resources
    - Information Technology
    - University Police and Safety
    - Note: the peer evaluator did not view job descriptions for the Budget Office.

A virtual site visit discussion with the Director of Human Resources (HR) supplemented the materials provided in the Ad Hoc Report and informed the peer evaluator about the following aspects of this process:

- In Fall 2018, HR began the job description update process by establishing a timeline and deadlines.
- Both the chancellor and provost were very supportive. In particular, they communicated their expectation that all units would complete the job description update process and would also conduct annual performance evaluations.
- HR created a spreadsheet of all existing positions and job descriptions by physically going through every personnel file to determine what information was available and what year the job description had last been updated.
- HR then sent individual emails to departments and units listing job descriptions that were either missing or more than two years old. If a job description was more than two years old, HR required it to be updated.
- HR used the existing job description template and provided support to colleagues in filling out the template. For positions missing job descriptions, HR found the announcement used when the position was posted and advertised or located a similar job description to provide as a resource.

- Between October 2018 and the beginning of January 2019, 90% of missing job descriptions and job descriptions that were more than two years old had been updated and were on file. The remaining job descriptions were received by the end of January.
- During June and July 2019, performance evaluations were conducted for all staff. This provided an additional opportunity to review or re-review job descriptions.
- In Summer 2019, HR provided an updated template for job descriptions for contract employee positions – replacing the previous one- to two-page lists of job duties.
- Going forward, on a continuous basis, HR will keep track of all job descriptions that are more than two years old and require units to update those job descriptions through the annual performance review process.

During virtual site visit discussions, deans and numerous staff members reported that HR had made the job description update process quite easy to complete and that the opportunity to discuss roles and responsibilities with employees was, overall, healthy; provided a context for examining equity and fairness; and enabled department and unit heads more fully to understand what staff were doing and how roles and responsibilities had evolved over time. At least one director reporting going through this job description update process with his student employees – and shared that this was useful in terms of managing his unit; working with staff employees better to understand student employees’ roles and responsibilities; and serving as a professional development opportunity for student employees.

The ongoing job description update process and annual performance evaluations also provide opportunities for MSUB department and unit heads to determine the extent to which qualified staff are addressing all necessary roles and responsibilities to maintain support operations. Given all of the above – including the extensive documentation provided in the MSUB Year Seven Ad Hoc Report and the thorough and frank discussions held during the virtual site visit, this peer evaluation recommends the Commission find MSUB in compliance with 2010 Standard 2.B.1.

## Recommendation Two

*Demonstrate a commitment to stabilize its administrative team and provide effective leadership and management, with appropriate levels of responsibility and accountability, for the major support and operational functions and units to foster fulfillment of its mission (2010 Standards 2.A.9, 2.A.11).*

As documented in the Year Seven Ad Hoc Report, MSUB has taken several steps to stabilize its administrative team including addressing multiple interim positions by hiring permanent deans (City College, the College of Education, and the College of Health Professions and Science), and vice chancellors (Student Access and Success and Administration and Finance). In at least three areas, Graduate Studies, Assessment and Accreditation, and e-Learning, full-time director positions replaced part-time positions. Discussions during the virtual site visit echoed the Ad Hoc Report’s recognition of the university community’s fatigue from the previously high rates of

leadership turnover and the consequent changes that new leadership brings. This peer evaluator, however, would characterize the vast majority of the comments shared as positive and hopeful that stable leadership is now in place and will remain in place at MSUB. In discussions with multiple leaders, including the Chancellor and the Provost, the peer evaluator heard commitment to the institution and to the success of its students, faculty, and staff – along with the recognition that trust must be earned and open, transparent communication with, and across, the university community must continue. To date, that communication has taken place through open forums, messages to the university community, leadership attendance at Student Senate and other meetings, and university administrators making themselves visible and approachable at university activities and in common spaces such as the cafeteria. Participants in the virtual site visit expressed the need for this level of engagement to continue and for trust to continue to be built.

Given the changes in leadership documented in the Year Seven Ad Hoc Report and the extensive – and candid – discussions held during the virtual site visit, this peer evaluation recommends that the Commission find that MSUB has demonstrated a commitment to stabilizing the administrative team and to providing effective leadership and management in support of mission fulfillment. The job description update process and the annual performance reviews described above serve as additional evidence of MSUB’s determination to ensure well-defined levels of responsibility and accountability for university units and operations. (2010 Standards 2.A.9, 2.A.11).

## Recommendation Four

*Develop a plan to monitor its internal and external environments and 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 (2010 Standard 5.B.3).*

As described above, MSUB has developed and promulgated a new mission, vision, core themes, objectives, sub-objectives, outcomes, and metrics to measure core theme achievement and mission fulfillment. During discussions with the Chancellor, the Provost, the Vice Chancellors, the strategic plan objective and sub-objective leads, the Director of Assessment and Accreditation, and the Director of Institutional Research, it was made clear to the peer evaluator that MSUB’s “Students First” Strategic Plan 2019-2016 is not a static document. Rather, the strategic plan and related action plans are being used to monitor the university’s internal and external environments – and to move forward on multiple fronts including, but not limited to, the reimagining of the General Education program; the development and implementation of an academic program review process; an enhanced focus on the strategies and tactics needed to increase student retention and graduation rates; the recruitment and retention of highly qualified faculty and staff; and multiple task forces whose work is aligned with strategic plan objectives and sub-objectives. Those task forces are addressing the following areas:

- Academic Affairs policies
- Advising
- Course caps
- Data restructuring
- Independent study
- Internship/Co-Op Education
- Predictive student success/college placement
- Space allocation
- Summer school
- the Center for Teaching and Learning
- Workload

MSUB has documented the review and revision of its mission, core themes, core theme objectives, sub-objectives, and metrics. It has also provided ample evidence in the Year Seven Ad Hoc Report and during site visit discussions about how the institution is using the strategic plan components to monitor and improve both the internal and external environments. Therefore, this peer evaluation recommends the Commission find that MSUB has made significant, substantial improvement to meeting 2010 Standard 5.B.3.

## Conclusion

As noted above, this peer evaluation recommends the Commission find that MSUB has addressed Recommendations One and Three and should be considered in compliance with NWCCU 2010 Standards 1.B.2 and 2.B.1. In addition, this peer evaluation recommends the Commission find that MSUB has made substantial improvements in the areas delineated in Recommendations Two and Four – namely in terms of the stabilization of the leadership team; enhanced communication between leadership and the university community; and the use of the strategic plan and action plans to examine and improve key aspects of university functions and operations. Also as noted above, given the pandemic-induced health and safety concerns and significant educational and economic disruptions that all institutions of higher education are confronting now and for the foreseeable future, this peer evaluation suggests MSUB provide a brief update on Recommendations Two and Four in its Fall 2021 Mid-Cycle Evaluation.

MSUB has completed a tremendous amount of work in a very short time and is to be highly commended for its efforts. During the virtual site visit, it was made abundantly clear that MSUB faculty, staff, and administrators really do put “Students First.” That statement is not just the title of MSUB’s very strong, well-developed Strategic Plan 2019-2026. It is the embodiment of the entire institution.

**Appendix A**  
**NWCCU Ad Hoc Visit Itinerary**  
**April 29, 2020**

9:00am-9:30am Kathleen Thatcher and Bernadette Jungblut

9:30am-10am

Dan Edelman, Chancellor

Melinda Arnold, Provost and Vice Chancellor for Academic Affairs

10am-11am Vice Chancellor meeting

Melinda Arnold, Provost and Vice Chancellor for Academic Affairs

Kim Hayworth, Vice Chancellor for Student Access and Success

Susan Simmers, Vice Chancellor for Administration and Finance

11am-noon Deans meeting

Kurt Toenjes, Dean, College of Health Professions and Science (CHPS)

Vicki Trier, Dean, City College

Christine Shearer, Dean, College of Liberal Arts and Social Sciences (CLASS)

Noon-1pm Strategic Plan Faculty subgroup

Leanne Gilbertson, Art History

Anne Cole, City College Writing

Sue Balter-Reitz, Communication

Ana Diaz, Philosophy

Jim Barron, Biology and Chair of Academic Senate

Heather Thompson-Bahm, City College Business

1pm-1:50pm Strategic Plan Staff subgroup

Sydney Donaldson, Dual Enrollment Coordinator

Mike Adkins, Director of Retention

Maureen Brakke, Director of Marketing and Communications

Darlene Hert, Director of Library Services

Barb Shafer, Director of Business Services

Cheri Johannes, Registrar

2:15pm-3:00pm Jody Stahl, Director of Human Resources

3pm-4:00pm Data group

Joann Stryker, Director of Institutional Research

Kathleen Thatcher, Director of Assessment and Accreditation

4pm-4:30pm Kathleen Thatcher and Bernadette Jungblut