

**University of Montevallo Strategic Plan 2009-2014**  
**Annual Monitoring and Reporting Schedule (By Theme)**

Strategic Theme	Indicator	Data Sources	Presentation Date	Status Format
<b>Theme #1:</b> The University of Montevallo should promote the development of a learning environment directly supportive of its statutory mission as Alabama's public liberal arts university.	Faculty and Staff Salaries	Chronicle, CUPA, COPLAC, peer institutions, aspirant institutions	August	DI/SN
	Educational Program	Annual Reports (Theme 1b, 2b) % of departments involved in interdisciplinary courses % of students involved in Study Abroad and NSE # of foreign languages offered	November	R/DI
	Learning Resources	Annual Report ( Theme 1c)	November	R
	Teaching Innovations	# of professional development sessions offered Participation levels and Evaluation Results	February	DI/SN
	Expansion of Athletics	Feasibility studies and recommendation reports	August	R
<b>Theme #2:</b> The constituencies and programs of the University of Montevallo should reflect the international character and demographic diversity required of a modern liberal arts university.	Student Population Demographics	Applicants, Admits, First Year Enrollments, Full-Time Enrollments, Part-Time Enrollments, FTE Enrollments, Total Undergraduate, Total Graduate (by nationality, ethnicity, race, gender, socioeconomic status, geography)	February	DI/SN
	Employee Population Demographics	Faculty and Staff diversity statistics	August	DI/SN
	Funding	Allocations for diversity efforts (International Services, Intercultural Affairs, Student and Employee Recruiting)	August	DI/SN

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<p><b>Theme #3:</b> The physical infrastructure of the University of Montevallo should enhance student learning; aid in recruitment and retention of students, faculty, and staff; and showcase our National Historic District and the original Olmsted plan.</p>	Construction and Renovation	Schedules and Progress Reports	May	R
	Deferred Maintenance	Facilities Condition Index (FCI)	May	DI/SN
	Technology Upgrades	Schedules and Progress Reports	February	R
<p><b>Theme #4:</b> In addition to the traditional inflow of revenues from tuition, fees, government appropriations, and gifts made possible through the U.M. Foundations' annual fund drive, the SPC recommends that the University augment resources through the completion of a successful capital campaign and the establishment of complementary revenue streams.</p>	Capital Campaign	# of endowed faculty chairs; funding level value of existing and new scholarships value of gifts earmarked for facilities	August	DI/SN
	Enrollment	Fall undergraduate and graduate enrollments Financial Aid-- total, federal, state, institutional Acceptance and yield rates Student Profiles-- ACT, GPA's, etc.	February	DI/SN
	Retention	fall-fall retention rates; 4, 5, and 6 year graduation rates	February	DI/SN

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<b>Theme #5:</b> The University should strengthen its identity with the external community and should strengthen current partnerships and establish new partnerships with key stakeholders. Innovative technologies should be used where appropriate.				
	Advertising	#, size/time-length, timing, location of media exposures	May	DI/SN
	Alumni	Alumni Giving Rates	May	DI/SN
	Programs--Montevallo Connection, Ebenezer Swamp, Shepherd Observatory, American Village, College Night	Annual Reports	November	R
	Continuing Education	# of class offerings; revenues/expenditures; Annual Report	November	DI/R
	Program Delivery	# of academic courses delivered at non-traditional times and/or locations; Annual report	November	DI/R

<b>Key:</b>
DI= Dashboard Indicators
R=Report
SN= Supporting Narrative
November
February
May
August