UM 2021-2027 Strategic Plan
2025-2026 Executive Summary

Overview

The University of Montevallo Board of Trustees voted to extend the 2021-2026 Strategic Plan by one year given pending changes in University leadership. As such, the 2021-2026 plan will be extended until the end of the 2026-2027 academic year with planning for the next cycle to occur during the same year. High-level assessment results for the 2025-2026 academic year are listed below by theme.

FOCUS ON FIDELITY IN DEMOGRAPHIC DATA MANAGEMENT AND REPORTING

The University of Montevallo complies with all federal and state data reporting requirements. The Office of Institutional Research Planning and Assessment is charged with ensuring there is fidelity in all reported data.

THEME I: IDENTITY AND MISSION

EMPHASIZE UNDERSTANDING OF WHAT A LIBERAL ARTS EDUCATION MEANS:

- A focus on understanding what a liberal arts education means is integrated into our first-year experience course (UM 101) which continues to be required for all first-time freshmen and select transfer students.
- Preview Day and Orientation continue to include an overview of the value of liberal arts.
- Montevallo Means More is a value-based campaign that includes the tenets of liberal arts education.
    - 10 Month Totals (August 2025-May 2026):
    - 18.5 million impressions (almost a 2,000% increase over the previous year)
    - 118 thousand clicks to the UM website (500% increase over the previous year)
    - 800 thousand video completions
    - 3,186 second action activities including 904 apply now buttons!

FOSTER A SUSTAINABILITY CULTURE

- Continued allocation to green fund grants.
- The University adopted an Energy Conservation Policy for Summer 2026 to mitigate the rising cost of energy in the those months.

THEME 2: FOCUS ON GROWTH

INCREASE RECRUITMENT, ENROLLMENT, AND RETENTION:

- Undergraduate enrollment saw a decline with 2446 in 2026 at census versus 2665 in 2025.
- Graduate enrollment, including doctoral increased from 419 in 2025 at census to 428 in 2026. The Office of Graduate Studies is revamping their recruiting plan to include cohort development in partnering school districts and Slate optimization.
- Fall to Fall Undergraduate Retention Rate decreased from 76% to 69% in 2026.
- Optimized Slate, a new admissions platform, that now fully supports recruiting both undergraduate and graduate students.
- Restructured the Office of Graduate Studies to distribute recruitment and retention efforts to the Colleges.

DEVELOP NEW ACADEMIC PROGRAMS:

- Launched the following new academic programs
  - BS Civic Leadership
  - Revised the BS/BA in Sociology to be the BS/BA in Criminal Justice and Sociology

BUDGET TRANSPARENCY

- The University of Montevallo administration appointed Dr. DeAnna Smith as the Vice President for Business Affairs, Chief Financial Officer (CFO), and Treasurer to serve on the Executive Team. Collaboratively, they developed a plan to balance the budget for FY 26. Presentations regarding the state of University finances were shared with the UM Board of Trustees, the UM Foundation Board, Student Government Association, and UM faculty and staff throughout the 2025-2026 reporting period. The University was able to repay

the $10 million loan early, create a balanced budget for FY 27, return funds to reserves, and maintain an S&P A- rating with stable outlook.

- Dr. Michelle R. Johnston took office as the UM President on July 15, 2026 with a continued commitment to financial health and transparency.

THEME 3: INNOVATION FOR TEACHING AND LEARNING

SUPPORT ONLINE EDUCATION:

- Responsibilities housed within the Malone Center for Excellence in Teaching were reassigned to the Faculty Development Advisory Committee; Emily Gill will serve as Chair to ensure continuity of services.
- Quality Matters licenses renewed.

ENCOURAGE ADOPTIONS OF LOW OR NO COST TEXBOOKS:

- In Fall 2026, 154 of all courses recorded adopting low or no cost textbooks such as open educational resources (OERs) versus 250 in Fall 2025. We attribute the decline to a lack of attribute assignments in Banner during course scheduling. Action has been taken to correct these omissions and improve fidelity of data for future reporting purposes.

SUPPORT FACULTY, FACULTY COMPENSATION AND PROFESSIONAL DEVELOPMENT:

- Due to budget shortfalls, faculty salaries were not increased for FY27. Faculty promotions, however, were honored using 2024 CUPA data so as to avoid compression.
- Faculty travel was capped at $1,500 and must be associated with a qualifying event.
- Faculty Development Advisory Committee grants and sabbaticals were postponed for FY 26.

THEME 4: SUPPORT FOR LEARNING

STRATEGIC EXPANSION OF ATHLETIC AND RELATED PROGRAMS:

- Budget shortfalls necessitated a review of scholarships, including stacking in athletics and special programs. The out-of-state tuition waiver was adjusted to cap the award at $12,480 per year. Merit scholarships were also decreased and/or revised to include a test score requirement.
- Mens and Womens Swimming and Tennis teams were closed due to budget shortfalls.

MAINTAIN AND EXTEND LIFE OF EXISTING BUILDINGS AND LANDSCAPING

- For the 2025-2026 academic year, the Physical Plant completed projects in 9 academic and administrative buildings and 2 athletic facilities. The decline in projects can be attributed to budgetary constraints.

UPDATE AND EXPAND RESIDENCE HALLS

- Three residence hall renovation projects were completed in FY2026. The decline in projects can be attributed to budgetary constraints.

ENSURE STAFF ARE APPROPRIATELY COMPENSATED

- We continue to review the appropriateness of CUPA comparisons for staff salaries.
- We continue to look at industry norms to help assess appropriate compensation for staff.
- Due to budget shortfalls, staff salaries were not increased for FY27.