

# Montana University System – OCHE

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CHE 103-Comparative Expenditures and FTE by Program

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**THE MONTANA UNIVERSITY SYSTEM  
OFFICE OF THE COMMISSIONER OF HIGHER EDUCATION  
COMPARATIVE EXPENDITURES AND FTE DATA BY PROGRAM**

<b>01 - Administration Program</b>					<b>Fund</b>
Office of the Commissioner of Higher Education					01100/06539
DESCRIPTION OF ACTIVITY	ACTUAL		BUDGETED		PERCENT CHANGE
	FY 2019	PERCENT	FY 2020	PERCENT	
<b>TOTAL FTEs</b>	23.28	100%	23.28	100%	0%
<b>PERSONAL SERVICES</b>					
61100 Employee Salaries	2,151,778	57%	2,415,582	57%	12%
61400 Employee Benefits	661,916	18%	681,318	16%	3%
<b>TOTAL PERSONAL SERVICES</b>	\$ 2,813,694	75%	\$ 3,096,900	74%	10%
<b>OPERATING COSTS</b>					
62100 Contracted Services	340,385	9%	352,000	8%	3%
62200 Supplies and Materials	49,543	1%	116,550	3%	135%
62300 Communications	63,483	2%	81,250	2%	28%
62400 Travel	45,037	1%	78,000	2%	73%
62500 Rent	127,216	3%	136,000	3%	7%
62700 Repair and Maintenance	6,815	0.2%	13,500	0.3%	98%
62800 Other Expenses	282,319	8%	249,171	6%	-12%
<b>TOTAL OPERATING EXPENSES</b>	\$ 914,798	24%	\$ 1,026,471	24%	12%
63100 Equipment	9,705	0.3%	10,000	0.2%	3%
69000 Leases	-	0%	-	0%	0%
66000 Grants	-	0%	-	0%	0%
67000 Benefits & Claims	-	0%	-	0%	0%
68000 Transfers	22,178	1%	76,773	2%	246%
<b>TOTAL EXPENDITURES</b>	\$ 3,760,375	100%	\$ 4,210,144	100%	12%

Description

The Office of the Commissioner of Higher Education (OCHE) Administration Program includes general administration of the university system, academic, financial, budgeting, legal administration, labor relations, human resources administration, student assistance administration, distance learning and transferability initiatives. Article X, Section 9, of the Montana Constitution requires that the Board of Regents appoint the commissioner and prescribe his/her powers and duties. The program is funded by a mix of general fund (~89%) and indirect cost recoveries (~11%).

**THE MONTANA UNIVERSITY SYSTEM  
OFFICE OF THE COMMISSIONER OF HIGHER EDUCATION  
COMPARATIVE EXPENDITURES AND FTE DATA BY PROGRAM**

<b>01 - Administration Program</b>					<b>Fund</b>
Research					02248
DESCRIPTION OF ACTIVITY	ACTUAL		BUDGETED		PERCENT CHANGE
	FY 2019	PERCENT	FY 2020	PERCENT	
<b>TOTAL FTEs</b>	0.50	100%	0.50	100%	0%
<b>PERSONAL SERVICES</b>					
61100 Employee Salaries	36,616	48%	41,960	21%	15%
61400 Employee Benefits	12,717	17%	13,987	7%	10%
<b>TOTAL PERSONAL SERVICES</b>	\$ 49,333	65%	\$ 55,946	28%	13%
<b>OPERATING COSTS</b>					
62100 Contracted Services	3,991	5%	101,221	50%	2436%
62200 Supplies and Materials	1,759	2%	2,000	1%	14%
62300 Communications	9,956	13%	1,000	0.5%	-90%
62400 Travel	11,015	14%	27,212	13%	147%
62500 Rent	-	0%	-	0%	0%
62700 Repair and Maintenance	-	0%	-	0%	0%
62800 Other Expenses	-	0%	16,000	8%	100%
<b>TOTAL OPERATING EXPENSES</b>	\$ 26,722	35%	\$ 147,433	72%	452%
68000 Transfers	-	0%	-	0%	0%
<b>TOTAL EXPENDITURES</b>	\$ 76,054	100%	\$ 203,379	100%	167%

Description

The research director position is funded by MSU, UM, and Montana Tech. The director of research and academic policy works to coordinate federal grants and systemwide research initiatives and reviews academic proposals to ensure compliance with academic policies. The position is required by the federal government.

Contracted services include special projects to be completed with the assistance of campuses.

**THE MONTANA UNIVERSITY SYSTEM  
OFFICE OF THE COMMISSIONER OF HIGHER EDUCATION  
COMPARATIVE EXPENDITURES AND FTE DATA BY PROGRAM**

<b>01 - Administration Program</b>					<b>Fund</b>
Private Grants					08225
DESCRIPTION OF ACTIVITY	ACTUAL		BUDGETED		PERCENT CHANGE
	FY 2019	PERCENT	FY 2020	PERCENT	
<b>TOTAL FTEs</b>	0.00	0%	0.00	0%	0%
<b>PERSONAL SERVICES</b>					
61100 Employee Salaries	-	0%	-	0%	0%
61400 Employee Benefits	-	0%	-	0%	0%
<b>TOTAL PERSONAL SERVICES</b>	\$ -	0%	\$ -	0%	0%
<b>OPERATING COSTS</b>					
62100 Contracted Services	271,263	83%	200,687	67%	-26%
62200 Supplies and Materials	17,616	5%	32,879	11%	87%
62300 Communications	1,046	0%	773	0%	-26%
62400 Travel	6,914	2%	25,379	9%	267%
62500 Rent	225	0.1%	225	0.1%	0%
62800 Other Expenses	28,590	9%	38,276	13%	34%
<b>TOTAL OPERATING EXPENSES</b>	\$ 325,653	100%	\$ 298,219	100%	-8%
63100 Equipment	-	0%	-	0%	0%
65000 Local Assistance	-	0%	-	0%	0%
66000 Grants	-	0%	-	0%	0%
<b>TOTAL EXPENDITURES</b>	\$ 325,653	100%	\$ 298,219	100%	-8%

Description

Private donations and grants from non-state, non-federal sources. Private grants have been awarded to OCHE from Lumina Foundation, NASH (National Association of System Heads), and iGraduate.

**THE MONTANA UNIVERSITY SYSTEM  
OFFICE OF THE COMMISSIONER OF HIGHER EDUCATION  
COMPARATIVE EXPENDITURES AND FTE DATA BY PROGRAM**

<b>02 - Student Assistance Program</b>					<b>Fund</b>
Campus Programs & General Fund Match					01100
DESCRIPTION OF ACTIVITY	ACTUAL		BUDGETED		PERCENT CHANGE
	FY 2019	PERCENT	FY 2020	PERCENT	
<b>TOTAL FTEs</b>	1.00	100%	1.00	100%	0%
<b>PERSONAL SERVICES</b>					
61100 Employee Salaries	53,021	0.6%	19,784	0.2%	-63%
61400 Employee Benefits	20,704	0.2%	6,594	0.1%	-68%
<b>TOTAL PERSONAL SERVICES</b>	\$ 73,725	0.8%	\$ 26,378	0.2%	-64%
<b>OPERATING COSTS</b>					
62800 Other (WICHE dues)	153,000	2%	156,000	1%	2%
<b>TOTAL OPERATING EXPENSES</b>	\$ 153,000	2%	\$ 156,000	1%	2%
<b>GRANTS</b>					
Professional Student Exchange:					
WICHE	2,143,440	22%	2,300,091	21%	7%
WWAMI (General Fund)	4,309,068	44%	4,909,140	45%	14%
WWAMI (MRPIP Fund)	311,324	3%	-	0%	-100%
Minnesota Dental	130,875	1%	133,750	1%	2%
WIMU Veterinary Program	1,022,880	11%	1,043,340	9%	2%
Student Grants:					
Governor's Postsecondary Scholarship Prg	280,411	3%	-	0%	-100%
MUS Student Access Scholarship	-	0%	900,000	8%	100%
Work Study Program	815,532	8%	815,750	7%	0%
Supplemental Ed Opportunity Grant (SEOG)	458,160	5%	737,160	7%	61%
<b>TOTAL GRANTS</b>	\$ 9,471,690	98%	\$ 10,839,231	98%	14%
<b>TOTAL EXPENDITURES</b>	\$ 9,698,415	100%	\$ 11,021,609	100%	14%

Description

- SEOG is the Supplemental Educational Opportunity Grant. The purpose of this program is to provide assistance to students who are in undergraduate degree or certificate degree programs who have not previously received a B.A. or B.S. degree. The federal share is not to exceed 75% of awards.

- The STATE COLLEGE WORK STUDY Program provides 70% of the students' wages.

- The MUS STUDENT ACCESS SCHOLARSHIP PROGRAM provides need based and adult learner scholarships to Montana students. Funds will be matched by the campus affiliated foundations.

The WICHE, WWAMI, Minnesota Dental, and WIMU Veterinary professional student exchange programs, are cooperative education agreements providing Montana residents with affordable access to highly enrolled professional education programs that are not available in Montana. Fields of study include medicine, osteopathic medicine, dentistry, veterinary medicine, occupational therapy, podiatry, and optometry.

**WICHE/WWAMI/Minnesota Dental/WIMU Veterinary  
Professional Student Exchange Programs  
Support by Program - FY 2019 Actual and FY 2020 Budgeted**

PROGRAM	FY 2019 ACTUAL		FY 2020 BUDGETED	
	Number of Students	Total Support	Number of Students	Total Support
<b>WICHE PSEP:</b>				
Medicine	25	\$802,656	25	\$816,250
Osteopathic Medicine	12	268,800	11	251,900
Dentistry	14	366,450	15	401,250
Veterinary Medicine	18	583,200	20	648,000
Podiatry	0	0	1	15,900
Optometry	4	72,100	5	92,125
Occupational Therapy	3	50,234	4	74,666
Financial Aid to Campuses				
<b>TOTAL WICHE PSEP</b>	<b>76</b>	<b>\$2,143,440</b>	<b>81</b>	<b>\$2,300,091</b>
<b>WIMU Veterinary Medicine</b> (# Students in funding status only; no funding included in OCHE budget for 1st year WIMU students @ MSU) <i>(Total WIMU Students in program)</i>	<b>30</b> <i>40</i>	<b>\$1,022,880</b>	<b>30</b> <i>40</i>	<b>\$1,043,340</b>
<b>WWAMI</b> (# Students in funding status only; no funding in OCHE budget for 1st year WWAMI students @ MSU) <i>(Total WWAMI Students in program)</i>	<b>89</b> <i>119</i>	<b>\$4,620,392</b>	<b>90</b> <i>120</i>	<b>\$4,909,140</b>
<b>Minnesota Dental</b>	<b>6</b>	<b>\$130,875</b>	<b>5</b>	<b>\$133,750</b>
<b>WICHE Dues</b>		<b>\$153,000</b>		<b>\$156,000</b>
<b>TOTAL</b>	<b>241</b>	<b>\$8,070,587</b>	<b>246</b>	<b>\$8,542,321</b>
General Fund		\$7,759,263		\$8,542,321
State Special (WWAMI)		\$311,324		\$0
		<u>\$8,070,587</u>		<u>\$8,542,321</u>

Description

The WICHE Professional Student Exchange (PSEP), WWAMI Medical Education Program, Minnesota Dental Program, and the WIMU Veterinary Medicine program are cooperative education agreements providing Montana residents access to highly enrolled professional education programs unavailable at public schools in Montana.

**THE MONTANA UNIVERSITY SYSTEM  
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COMPARATIVE EXPENDITURES AND FTE DATA BY PROGRAM**

<b>02 - Student Assistance Program</b>					<b>Fund</b>
Family Education Savings program Administrative Fee					02846
DESCRIPTION OF ACTIVITY	ACTUAL		BUDGETED		PERCENT CHANGE
	FY 2019	PERCENT	FY 2020	PERCENT	
<b>TOTAL FTEs</b>	0.50	100%	0.50	100%	0%
<b>PERSONAL SERVICES</b>					
61100 Employee Salaries	33,830	20%	75,473	20%	123%
61400 Employee Benefits	11,982	7%	25,157	7%	110%
<b>TOTAL PERSONAL SERVICES</b>	\$ 45,811	26%	\$ 100,630	27%	120%
<b>OPERATING COSTS</b>					
62100 Contracted Services	115,029	66%	157,807	43%	37%
62200 Supplies and Materials	6,326	4%	6,400	2%	1%
62300 Communications	22	0%	100,050	27%	447751%
62400 Travel	321	0.2%	350	0.1%	9%
62500 Rent	-	0%	-	0%	0%
62600 Utilities	-	0%	-	0%	0%
62700 Repair and Maintenance	-	0%	-	0%	0%
62800 Other Expenses	5,887	3%	6,000	2%	2%
<b>TOTAL OPERATING EXPENSES</b>	\$ 127,586	74%	\$ 270,607	73%	112%
63100 Equipment	-	0%	-	0%	0%
65000 Local Assistance	-	0%	-	0%	0%
66000 Grants	-	0%	-	0%	0%
67000 Benefits & Claims	-	0%	-	0%	0%
68000 Transfers	-	0%	-	0%	0%
<b>TOTAL EXPENDITURES</b>	\$ 173,397	100%	\$ 371,237	100%	114%

Description

This state special revenue account is funded by annual account maintenance fees paid by non-resident participants and basis points on the investment products.

**THE MONTANA UNIVERSITY SYSTEM  
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<b>02 - Student Assistance Program</b>					<b>Fund</b>
Rural Physician Incentive Program (MRPIP) - Statutory Appropriation					02943
DESCRIPTION OF ACTIVITY	ACTUAL		BUDGETED		PERCENT CHANGE
	FY 2019	PERCENT	FY 2020	PERCENT	
<b>TOTAL FTEs</b>	0.00	0%	0.00	0%	0%
<b>PERSONAL SERVICES</b>					
61100 Employee Salaries	-	0%	30,000	2%	100%
61400 Employee Benefits	-	0%	10,000	1%	100%
<b>TOTAL PERSONAL SERVICES</b>	\$ -	0%	\$ 40,000	3%	100%
<b>OPERATING COSTS</b>					
62100 Contracted Services	-	0%	-	0%	0%
62200 Supplies and Materials	-	0%	-	0%	0%
62300 Communications	-	0%	-	0%	0%
62400 Travel	-	0%	-	0%	0%
62500 Rent	-	0%	-	0%	0%
62700 Repair and Maintenance	-	0%	-	0%	0%
62800 Other Expenses	-	0%	30,000	2%	100%
<b>TOTAL OPERATING EXPENSES</b>	\$ -	0%	\$ 30,000	2%	100%
66000 Grants - Professional Programs	311,324	21%	-	0%	-100%
66000 Grants - MRPIP	1,137,927	79%	1,385,375	95%	22%
68000 Transfers	-	0%	-	0%	0%
<b>TOTAL EXPENDITURES</b>	\$ 1,449,250	100%	\$ 1,455,375	100%	0%

	<u>Description</u>	
	<u>FY19 Actual</u>	<u>FY20 Budgeted</u>
Beginning Fund Balance	\$3,730,334.81	\$3,468,362.85
Revenue	\$1,187,278.51	\$1,215,237.00
Expenditures	(\$1,449,250.47)	(\$1,455,375.00)
Ending Fund Balance	\$3,468,362.85	\$3,228,224.85

Per state law, the Montana Board of Regents assesses an annual fee to all professional students preparing to be physicians who are supported by the state pursuant to an interstate compact for professional education in the fields of medicine and osteopathic medicine through the WICHE and WWAMI programs. The fee cannot exceed 16% of the annual individual support fee paid by the state pursuant to §20-26-1502, MCA except for those students entering the MT WWAMI medical program starting with academic year 2018/2019 and forward who choose to pay a higher fee of 2.5 times the standard MRPIP fee amount in lieu of a contractual commitment to return to Montana to practice upon completion of their medical training pursuant to §20-25-810, MCA, which was authorized by the 2017 Montana Legislature. Funds in this account are statutorily appropriated to the Board of Regents to be used to pay the medical education debts of physicians who serve rural communities or populations that are medically underserved and the expenses of administering the rural physician incentive program; although, the 2017 Montana Legislature did authorize the one-time only use of funds in this account to support the 2019 biennium present law adjustments for the WWAMI medical education program and to support graduate medical education through the family practice residency program in FY 2018. During the The 2017 Legislative Session the Legislature also changed state law increasing the maximum loan repayment a physician can receive from the rural physician incentive program pursuant to 20-26-1503, MCA from \$100,000 to \$150,000 effective July 1, 2017.



## MONTANA RURAL PHYSICIAN INCENTIVE PROGRAM (MRPIP)

### Revenue and Expenses - FY 2019 Actual and FY 2020 Estimated

	FY 2019 Actual			FY 2020 Estimated		
	Annual Surcharge	Number of Students	Amount	Annual Surcharge	Number of Students	Amount
<b>Revenue:</b>						
MRPIP Standard Rate Surcharges	\$ 5,224	135	\$703,600	\$ 5,224	120	\$626,880
MRPIP Higher Rate Surcharges	\$ 13,060	10	\$130,600	\$ 13,060	24	\$313,440
Osteopathic Student Surcharges	\$ 3,584	11	\$39,424	\$ 3,664	13	\$47,632
STIP Earnings			\$86,370			\$6,373
General Fund Transfer			\$227,285			\$227,285
<b>Total Revenue:</b>			<b>\$1,187,278</b>			<b>\$1,221,610</b>
<b>Expenses:</b>						
Transfer - Professional Programs			\$311,323			\$0
Transfer - Family Practice Residency GME			\$0			\$0
Loan Disbursements			\$1,137,927			\$1,385,375
Administrative Expenses			\$0			\$70,000
<b>Total Expenses:</b>			<b>\$1,449,250</b>			<b>\$1,455,375</b>

**THE MONTANA UNIVERSITY SYSTEM  
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COMPARATIVE EXPENDITURES AND FTE DATA BY PROGRAM**

<b>02 - Student Assistance Program</b>					<b>Fund</b>
Institutional Nursing Incentive Program					01100
DESCRIPTION OF ACTIVITY	ACTUAL		BUDGETED		PERCENT CHANGE
	FY 2019	PERCENT	FY 2020	PERCENT	
<b>TOTAL FTEs</b>	0.00	0%	0.00	0%	0%
<b>PERSONAL SERVICES</b>					
61100 Employee Salaries	-	0%	-	0%	0%
61400 Employee Benefits	-	0%	-	0%	0%
<b>TOTAL PERSONAL SERVICES</b>	\$ -	0%	\$ -	0%	0%
<b>OPERATING COSTS</b>					
62100 Contracted Services	-	0%	-	0%	0%
62200 Supplies and Materials	-	0%	-	0%	0%
62300 Communications	-	0%	-	0%	0%
62400 Travel	-	0%	-	0%	0%
62500 Rent	-	0%	-	0%	0%
62700 Repair and Maintenance	-	0%	-	0%	0%
62800 Other Expenses	-	0%	-	0%	0%
<b>TOTAL OPERATING EXPENSES</b>	\$ -	0%	\$ -	0%	0%
63100 Equipment		0%		0%	0%
66000 Grants	51,933	100%	43,388	100%	-16%
<b>TOTAL EXPENDITURES</b>	\$ 51,933	100%	\$ 43,388	100%	-16%

Description

The Montana Institutional Nursing Incentive Program is a loan reimbursement program for individuals who are licensed to practice as registered professional nurses pursuant to 20-26-1511, MCA and are currently employed as full-time registered professional nurses by either the Montana State Prison or the Montana State Hospital. The Board of Regents adopted Policy 940.15, Institutional Nursing Incentive Program, to implement the provisions of 20-26-1511, MCA.

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<b>02 - Student Assistance Program</b>					<b>Fund</b>
STEM (Science, Technology, Engineering, Math, Healthcare) Scholarship					02027
DESCRIPTION OF ACTIVITY	ACTUAL		BUDGETED		PERCENT CHANGE
	FY 2019	PERCENT	FY 2020	PERCENT	
<b>TOTAL FTEs</b>	0.00	0%	0.00	0%	0%
<b>PERSONAL SERVICES</b>					
61100 Employee Salaries	-	0%	12,396	2%	100%
61400 Employee Benefits	-	0%	-	0%	0%
<b>TOTAL PERSONAL SERVICES</b>	\$ -	0%	\$ 12,396	2%	100%
<b>OPERATING COSTS</b>					
62100 Contracted Services	-	0%	-	0%	0%
62200 Supplies and Materials	-	0%	-	0%	0%
62300 Communications	-	0%	-	0%	0%
62400 Travel	-	0%	-	0%	0%
62500 Rent	-	0%	-	0%	0%
62700 Repair and Maintenance	-	0%	-	0%	0%
62800 Other Expenses	-	0%	-	0%	0%
<b>TOTAL OPERATING EXPENSES</b>	\$ -	0%	\$ -	0%	0%
63100 Equipment	-	0%	-	0%	0%
66000 Grants/Scholarships	-	0%	500,000	98%	100%
<b>TOTAL EXPENDITURES</b>	\$ -	0%	\$ 512,396	100%	100%

Description

The Montana STEM Scholarship program is to provide incentive for Montana high school students to prepare for, enter into, and complete degrees in postsecondary fields related to science, technology, engineering, mathematics, and health care, with the goals of increasing the number of STEM degree recipients participating in Montana's workforce. The 66th Legislature adopted funding STEM Scholarships with lottery net revenue proceeds via SB 60. The first cohort of scholarships will be awarded beginning Fall Semester 2020.

**THE MONTANA UNIVERSITY SYSTEM  
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<b>05 - MUS Group Insurance Program</b>					<b>Fund</b>
MUS Self-Funded Health Insurance					06008-06010
DESCRIPTION OF ACTIVITY	ACTUAL		BUDGETED		PERCENT CHANGE
	FY 2019	PERCENT	FY 2020	PERCENT	
<b>TOTAL FTEs</b>	7.00	100%	7.00	100%	0%
<b>PERSONAL SERVICES</b>					
61100 Employee Salaries	516,377	1%	559,301	0%	8%
61102 Overtime	10,071	0.01%	10,000	0.01%	-1%
61400 Employee Benefits	179,097	0.18%	139,825	0.09%	-22%
61134 Termination Pay	4,647	0.00%	-	0%	-100%
<b>TOTAL PERSONAL SERVICES</b>	\$ 710,192	1%	\$ 709,126	0%	0%
<b>OPERATING COSTS</b>					
62100 Contracted Services	7,244,505	7%	18,959,792	13%	162%
62200 Supplies and Materials	29,619	0.03%	30,508	0.02%	3%
62300 Communications	16,180	0.02%	16,666	0.01%	3%
62400 Travel	67,207	0.07%	69,223	0.05%	3%
62500 Rent	59,646	0.06%	60,000	0.04%	1%
62700 Repair and Maintenance	-	0%	-	0%	0%
62800 Other Expenses	797,723	1%	1,000,000	1%	25%
<b>TOTAL OPERATING EXPENSES</b>	\$ 8,214,881	8%	\$ 20,136,189	13%	145%
63100 Equipment	-	0%	-	0%	0%
65000 Local Assistance	-	0%	-	0%	0%
66000 Grants	-	0%	-	0%	0%
67000 Insurance Benefit Payments	93,309,883	91%	128,793,408	86%	38%
68000 Transfers	-	0%	-	0%	0%
6A000 Other Post Employment Benefits	-	0%	-	0%	0%
<b>TOTAL EXPENDITURES</b>	\$ 102,234,957	100%	\$ 149,638,723	100%	46%

Description

The Board of Regents, through OCHE, provides faculty and staff with group health benefits through the MUS Group Insurance Program, which includes a flexible spending account option. Eligible university system employees and dependents are offered medical, pharmacy, dental, vision and group life insurance, as well as long-term disability and long-term benefits. Retirees and their enrolled dependents are eligible to continue medical and pharmacy coverage on a self-pay basis.

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<b>06 - Educational Outreach &amp; Diversity</b>					<b>Fund</b>
Educational Talent Search (ETS)					03806
DESCRIPTION OF ACTIVITY	ACTUAL		BUDGETED		PERCENT CHANGE
	FY 2019	PERCENT	FY 2020	PERCENT	
<b>TOTAL FTEs</b>	11.65	100%	9.99	100%	-14%
<b>PERSONAL SERVICES</b>					
61100 Employee Salaries	321,615	51%	395,170	48%	23%
61400 Employee Benefits	159,070	25%	168,369	21%	6%
<b>TOTAL PERSONAL SERVICES</b>	\$ 480,686	76%	\$ 563,539	69%	17%
<b>OPERATING COSTS</b>					
62100 Contracted Services	12,466	2%	10,533	1%	-16%
62200 Supplies and Materials	18,907	3%	7,750	1%	-59%
62300 Communications	9,254	1%	9,000	1%	-3%
62400 Travel	52,435	8%	85,557	11%	63%
62500 Rent	17,455	3%	16,800	2%	-4%
62700 Repair and Maintenance	85	0%	-	0%	-100%
62800 Other Expenses	44,500	7%	98,915	12%	122%
<b>TOTAL OPERATING EXPENSES</b>	\$ 155,101	24%	\$ 228,555	28%	47%
63100 Equipment	-	0%	-	0%	0%
65000 Local Assistance	-	0%	-	0%	0%
66000 Grants	-	0%	22,911	3%	100%
67000 Benefits & Claims	-	0%	-	0%	0%
68000 Transfers	-	0%	-	0%	0%
<b>TOTAL EXPENDITURES</b>	\$ 635,786	100%	\$ 815,005	100%	28%

Description

ETS is a federally funded pre-college outreach program that serves low income, first generation college students in grades 6th -12th to complete high school and enroll in an institution of higher education of their choice. The target area locations include Great Falls and the Blackfeet, Crow, and Flathead Reservations. Funds for this program come from the 1965 Higher Education Act which created the three original TRIO programs designed to address the non-monetary barriers to postsecondary education. ETS provides individualized mentoring, advising, counseling and related services such as college visits, test preparation and job shadowing that encourage and assist students and their families to consider, prepare for, enroll in and successfully complete a postsecondary degree or certificate program. ETS received a one-time-only supplemental STEM grant in FY 2020 to host STEM Career Workshops and provide math tutoring.

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<b>06 - Educational Outreach &amp; Diversity</b>					<b>Fund</b>
Gaining Early Awareness & Readiness for Undergraduate Programs (GEAR UP)					03042
DESCRIPTION OF ACTIVITY	ACTUAL		BUDGETED		PERCENT CHANGE
	FY 2019	PERCENT	FY 2020	PERCENT	
<b>TOTAL FTEs</b>	7.25	100%	7.25	100%	0%
<b>PERSONAL SERVICES</b>					
61100 Employee Salaries	150,714	4%	271,471	6%	80%
61400 Employee Benefits	64,546	2%	159,118	4%	147%
<b>TOTAL PERSONAL SERVICES</b>	\$ 215,260	5%	\$ 430,589	10%	100%
<b>OPERATING COSTS</b>					
62100 Contracted Services	946,746	22%	401,450	9%	-58%
62200 Supplies and Materials	78,527	2%	97,900	2%	25%
62300 Communications	5,186	0.1%	7,250	0.2%	40%
62400 Travel	61,556	1%	189,760	4%	208%
62500 Rent	36,579	1%	42,000	1%	15%
62700 Repair and Maintenance	-	0%	-	0%	0%
62800 Other Expenses	1,165,165	27%	120,630	3%	-90%
<b>TOTAL OPERATING EXPENSES</b>	\$ 2,293,760	54%	\$ 858,990	20%	-63%
66000 Grants	1,589,500	37%	2,747,127	64%	73%
68000 Transfers	174,139	4%	250,000	6%	44%
<b>TOTAL EXPENDITURES</b>	\$ 4,272,659	100%	\$ 4,286,706	100%	0.3%

Description

Montana GEAR UP is going into its third year of a seven-year federal Department of Education discretionary grant administered by the Office of the Commissioner of Higher Education. FY 2019 was the closeout of a one-year extension of the previous grant. Montana GEAR UP works with 18 schools in low-income communities to increase student's academic performance, high school graduation rate, and enrollment in postsecondary education. GEAR UP also supports statewide services with ACT Plus Writing assessment for all Montana public high school juniors.

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<b>06 - Educational Outreach &amp; Diversity</b>					<b>Fund</b>
Gear Up (Scholarship Component)					03412
DESCRIPTION OF ACTIVITY	ACTUAL		BUDGETED		PERCENT CHANGE
	FY 2019	PERCENT	FY 2020	PERCENT	
<b>TOTAL FTEs</b>	0.00	0%	0.00	0%	0%
<b>PERSONAL SERVICES</b>					
61100 Employee Salaries	3,559	1%	10,846	2%	2%
61400 Employee Benefits	1,363	0.2%	4,154	1%	1%
<b>TOTAL PERSONAL SERVICES</b>	\$ 4,922	1%	\$ 15,000	3%	3%
<b>OPERATING COSTS</b>					
62100 Contracted Services	-	0%	-	0%	0%
62200 Supplies and Materials	-	0%	-	0%	0%
62300 Communications	3	0%	5	0%	96%
62400 Travel	-	0%	-	0%	0%
62500 Rent	-	0%	-	0%	0%
62600 Utilities	-	0%	-	0%	0%
62700 Repair and Maintenance	-	0%	-	0%	0%
62800 Other - Scholarships/Fellowships	629,175	99%	427,350	97%	-32%
<b>TOTAL OPERATING EXPENSES</b>	\$ 629,177	99%	\$ 427,355	97%	-32%
63100 Equipment and Capital	-	0%	-	0%	0%
66000 Grants	-	0%	-	0%	0%
<b>TOTAL EXPENDITURES</b>	\$ 634,099	100%	\$ 442,355	100%	-30%

Description

As a part of the Montana GEAR UP Program, scholarships are provided to students served under both the 1999 and 2005 grants. As juniors, all GEAR UP students taking college prep curriculum and maintaining a 2.0 GPA are eligible to apply for and receive a \$1,500 Achievement Grant. Students receiving the Achievement Grants may then apply for the competitive Pathways Scholarship valued at up to \$22,200. Applicants must be Pell Grant eligible, have a 2.5 GPA and take the college prep curriculum, plus submit an application providing extracurricular and community activities, a one-page personal statement, and a school project.

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<b>06 - Educational Outreach &amp; Diversity</b>					<b>Fund</b>
American Indian / Minority Achievement					01100
DESCRIPTION OF ACTIVITY	ACTUAL		BUDGETED		PERCENT CHANGE
	FY 2019	PERCENT	FY 2020	PERCENT	
<b>TOTAL FTEs</b>	1.00	100%	1.00	100%	0%
<b>PERSONAL SERVICES</b>					
61100 Employee Salaries	98,353	76%	102,828	73%	5%
61400 Employee Benefits	28,062	22%	34,276	24%	22%
<b>TOTAL PERSONAL SERVICES</b>	\$ 126,415	98%	\$ 137,104	98%	8%
<b>OPERATING COSTS</b>					
62100 Contracted Services	-	0%	-	0%	0%
62200 Supplies and Materials	633	0.5%	650	0.5%	3%
62300 Communications	540	0.4%	540	0.4%	-0.1%
62400 Travel	1,812	1%	1,997	1%	10%
62500 Rent	-	0%	-	0%	0%
62700 Repair and Maintenance	-	0%	-	0%	0%
62800 Other Expenses	26	0%	50	0%	91%
<b>TOTAL OPERATING EXPENSES</b>	\$ 3,011	2%	\$ 3,237	2%	8%
63100 Equipment	-	0%	-	0%	0%
65000 Local Assistance	-	0%	-	0%	0%
66000 Grants	-	0%	-	0%	0%
67000 Benefits & Claims	-	0%	-	0%	0%
68000 Transfers	-	0%	-	0%	0%
<b>TOTAL EXPENDITURES</b>	\$ 129,426	100%	\$ 140,341	100%	8%

Description

This program is responsible for American Indian and minority recruitment, enrollment, retention, and graduation rates in the university system. It also oversees campus diversity plans and works to implement Indian Education for All. The program is funded entirely from state general fund.



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<b>07 - MUS Workers' Compensation Program</b>					<b>Fund</b>
MUS Self-Funded Workers' Compensation					06082
<b>DESCRIPTION OF ACTIVITY</b>	<b>ACTUAL</b>		<b>BUDGETED</b>		<b>PERCENT CHANGE</b>
	<b>FY 2019</b>	<b>PERCENT</b>	<b>FY 2020</b>	<b>PERCENT</b>	
<b>TOTAL FTEs</b>	1.00	100%	1.00	100%	0%
<b>PERSONAL SERVICES</b>					
61100 Employee Salaries	75,349	2%	75,910	2%	1%
61400 Employee Benefits	25,273	1%	25,303	1%	0.1%
<b>TOTAL PERSONAL SERVICES</b>	<b>\$ 100,621</b>	<b>3%</b>	<b>\$ 101,213</b>	<b>2%</b>	<b>1%</b>
<b>OPERATING COSTS</b>					
62100 Contracted Services	661,226	17%	686,200	17%	4%
62200 Supplies and Materials	805	0%	1,000	0%	24%
62300 Communications	500	0%	500	0%	0%
62400 Travel	709	0%	1,000	0%	41%
62500 Rent	8,677	0.2%	9,000	0.2%	4%
62700 Repair and Maintenance	-	0%	-	0%	0%
62800 Other Expenses	34,644	1%	41,750	1%	21%
62800 Other Exp-Safety Smart Funding	461,557	12%	300,000	7%	-35%
<b>TOTAL OPERATING EXPENSES</b>	<b>\$ 1,168,118</b>	<b>30%</b>	<b>\$ 1,039,450</b>	<b>25%</b>	<b>-11%</b>
63100 Equipment	-	0%	-	0%	0%
67000 Benefits & Claims	2,618,266	67%	3,000,000	72%	15%
<b>TOTAL EXPENDITURES</b>	<b>\$ 3,887,006</b>	<b>100%</b>	<b>\$ 4,140,663</b>	<b>100%</b>	<b>7%</b>

Description

The Montana Board of Regents Created the MUS Self-Funded Workers' Compensation program in April 2003, as authorized by the Workers' Compensation Act (section 39-71-403, MCA). This program provides workers' compensation for all university system employees including the Office of the Commissioner of Higher Education. The FY 20 budgeted amount in benefits and claims is an actuary estimate of the ultimate losses. In the past, actual expenses have not risen to that level.

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<b>08 - Work Force Development Program</b>					<b>Fund</b>
Carl D. Perkins					01100/03215
DESCRIPTION OF ACTIVITY	ACTUAL		BUDGETED		PERCENT CHANGE
	FY 2019	PERCENT	FY 2020	PERCENT	
<b>TOTAL FTEs</b>	4.20	100%	4.20	100%	0%
<b>PERSONAL SERVICES</b>					
61100 Employee Salaries	167,646	3%	171,731	3%	2%
61400 Employee Benefits	54,910	1%	59,638	1%	9%
<b>TOTAL PERSONAL SERVICES</b>	\$ 222,556	4%	\$ 231,370	4%	4%
<b>OPERATING COSTS</b>					
62100 Contracted Services	5,833	0.1%	39,578	1%	579%
62200 Supplies and Materials	6,104	0.1%	20,075	0.3%	229%
62300 Communications	1,078	0%	1,004	0%	-7%
62400 Travel	16,766	0.3%	38,830	1%	132%
62500 Rent	28,924	1%	14,384	0%	-50%
62800 Other Expenses	10,349	0.2%	220,208	3%	2028%
<b>TOTAL OPERATING EXPENSES</b>	\$ 69,055	1%	\$ 334,079	5%	384%
66000 Grants	2,019,689	37%	2,363,738	37%	17%
68000 Transfers to OPI	3,105,080	57%	3,509,101	55%	13%
<b>TOTAL EXPENDITURES</b>	\$ 5,416,379	100%	\$ 6,438,288	100%	19%

Description

In July 2018, the Strengthening Career and Technical Education for the 21st Century Act was signed into law, which reauthorized the Carl D. Perkins Career and Technical Education Act of 2006. The amended Act, now Perkins V, brings changes to the \$1.2 billion annual federal investment in career and technical education (CTE). The four-year State CTE Plan is currently under development and will be submitted to the U.S. Department of Education in April 2020.

Perkins V provides federal support for CTE programs and focuses on improving the academic and technical achievement of CTE students, strengthening the connections between secondary and postsecondary education and improving accountability. Perkins V affords states and local communities the opportunity to implement a vision for CTE that uniquely supports the range of educational needs of students — exploration through career preparation — and balances those student needs with the current and emerging needs of the economy.

Perkins V continues to have a MOE requirement in section 211, which states that in order for a state to receive their full allotment of funds under the program, the state must have spent at least the same amount as in the previous year on CTE, as well as a dollar-for-dollar general fund for the total 5% set aside for Administrative costs. This amount increased to \$94,716.61 starting FY20.

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<b>11 - Tribal College Assistance Program</b>					<b>Fund</b>
Non-beneficiary Tribal Student Assistance					01100
<b>DESCRIPTION OF ACTIVITY</b>	<b>ACTUAL</b>		<b>BUDGETED</b>		<b>PERCENT CHANGE</b>
	<b>FY 2019</b>	<b>PERCENT</b>	<b>FY 2020</b>	<b>PERCENT</b>	
<b>TOTAL FTEs</b>	0.00	0%	0.00	0%	0%
<b>PERSONAL SERVICES</b>					
61100 Employee Salaries	-	0%	-	0%	0%
61400 Employee Benefits	-	0%	-	0%	0%
<b>TOTAL PERSONAL SERVICES</b>	\$ -	0%	\$ -	0%	0%
<b>OPERATING COSTS</b>					
62100 Contracted Services	-	0%	-	0%	0%
62200 Supplies and Materials	-	0%	-	0%	0%
62300 Communications	-	0%	-	0%	0%
62400 Travel	-	0%	-	0%	0%
62500 Rent	-	0%	-	0%	0%
62700 Repair and Maintenance	-	0%	-	0%	0%
62800 Other Expenses	-	0%	-	0%	0%
<b>TOTAL OPERATING EXPENSES</b>	\$ -	0%	\$ -	0%	0%
66000 Grants	837,875	100%	1,012,875	100%	21%
<b>TOTAL EXPENDITURES</b>	\$ 837,875	100%	\$ 1,012,875	100%	21%

Description

The purpose of this appropriation is to provide state funded reimbursements to tribal colleges for resident non-beneficiary students (non-enrolled tribal members) attending tribally controlled community colleges in Montana, according to the provisions of 20-25-428, MCA. In FY 18, state law set a statutory maximum of \$3,280 per non-beneficiary student. In FY 19, the reimbursement per student was adjusted to \$3,215.72 per the requirements of state law (20-25-428, MCA). FY 20 includes a one-time-only appropriation of \$175,000 for tribal colleges to offer preparatory courses for the HiSET (high school equivalency test).

<b>FY19 Non-beneficiary Student Distribution Tribal Colleges</b>		
<b>College</b>	<b>Non-Beneficiary FTE Reported</b>	<b>Prorated \$3,215.72/FTE</b>
Aaniiih Nakoda College	14.20	\$ 45,663
Blackfeet Community College	21.37	\$ 68,709
Chief Dull Knife College	21.13	\$ 67,959
Fort Peck Community College	35.23	\$ 113,301
Little Big Horn College	5.87	\$ 18,866
Salish Kootenai College	149.49	\$ 480,715
Stone Child College	13.27	\$ 42,662
<b>Total</b>	<b>260.56</b>	<b>\$ 837,875</b>

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12 - Guaranteed Student Loan Program					Fund
Operating Fund					03400
DESCRIPTION OF ACTIVITY	ACTUAL		BUDGETED		PERCENT CHANGE
	FY 2019	PERCENT	FY 2020	PERCENT	
<b>TOTAL FTEs</b>	41.02	100%	3.00	100%	-93%
<b>PERSONAL SERVICES</b>					
61100 Employee Salaries	36,638	15%	144,719	22%	295%
61400 Employee Benefits	14,487	6%	61,255	9%	323%
<b>TOTAL PERSONAL SERVICES</b>	\$ 51,125	21%	\$ 205,974	31%	303%
<b>OPERATING COSTS</b>					
62100 Contracted Services	158,217	65%	50,000	8%	-68%
62200 Supplies and Materials	425	0.2%	500	0.1%	18%
62300 Communications	1,430	1%	1,430	0.2%	0%
62400 Travel	-	0%	-	0%	0%
62500 Rent	14,462	6%	14,462	2%	0%
62600 Utilities	-	0%	-	0%	0%
62700 Repair and Maintenance	-	0%	-	0%	0%
62800 Other Expenses	16,412	7%	390,000	59%	2276%
<b>TOTAL OPERATING EXPENSES</b>	\$ 190,945	79%	\$ 456,392	69%	139%
63100 Equipment	-	0%	-	0%	0%
65000 Local Assistance	-	0%	-	0%	0%
66000 Grants	-	0%	-	0%	0%
67000 Benefits & Claims	-	0%	-	0%	0%
68000 Transfers	-	0%	-	0%	0%
69000 Debt Service	-	0%	-	0%	0%
<b>TOTAL EXPENDITURES</b>	\$ 242,070	100%	\$ 662,366	100%	174%

Description

Federal Family Education Loan Program new loan originations were eliminated with the federally mandated shift to the Direct Loan Program on July 1, 2010. GSL continued to maintain the existing guaranty portfolio until transferring the portfolio to a federally approved national education loan servicing provider on October 1, 2017. The transfer was approved by the federal government and by the Board of Regents at the May 25-26, 2017 meeting. GSL will continue to maintain the agency operating fund and to provide other student financial aid-related activities for the benefit of students as determined by the Board.

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<b>12 - Guaranteed Student Loan Program</b>					<b>Fund</b>
Private Funding					08009/08046
DESCRIPTION OF ACTIVITY	ACTUAL		BUDGETED		PERCENT CHANGE
	FY 2019	PERCENT	FY 2020	PERCENT	
<b>TOTAL FTEs</b>	0.0	0%	0.0	0%	0%
<b>PERSONAL SERVICES</b>					
61100 Employee Salaries	-	0%	-	0%	0%
61400 Employee Benefits	-	0%	-	0%	0%
<b>TOTAL PERSONAL SERVICES</b>	\$ -	0%	\$ -	0%	0%
<b>OPERATING COSTS</b>					
62100 Contracted Services	26,478	4%	26,500	5%	0%
62200 Supplies and Materials	129	0%	250	0.1%	94%
62300 Communications	1,088	0.2%	1,100	0.2%	1%
62400 Travel	962	0.2%	1,000	0.2%	4%
62500 Rent	-	0%	-	0%	0%
62700 Repair and Maintenance	-	0%	-	0%	0%
62800 Other Expenses	609,277	96%	471,150	94%	-23%
<b>TOTAL OPERATING EXPENSES</b>	\$ 637,934	100%	\$ 500,000	100%	-22%
68000 Fund Transfers	1	0%	-	0%	-100%
<b>TOTAL EXPENDITURES</b>	\$ 637,935	100%	\$ 500,000	100%	-22%

Description

Private funding received from the federally approved national education loan servicing provider to continue student financial aid-related activities for the benefits of students as determined by the Board. The private grant has been awarded for 6-years. FY 19 is the first year of the grant and it will end June 30, 2025.

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<b>13 - Board of Regents - Admin</b>					<b>Fund</b>
Operating Account					01100
DESCRIPTION OF ACTIVITY	ACTUAL		BUDGETED		PERCENT CHANGE
	FY 2019	PERCENT	FY 2020	PERCENT	
<b>TOTAL FTEs</b>	0.00	0%	0.00	0%	0%
<b>PERSONAL SERVICES</b>					
61300 Per Diem	3,360	7%	6,300	9%	88%
<b>TOTAL PERSONAL SERVICES</b>	\$ 3,360	7%	\$ 6,300	9%	88%
<b>OPERATING COSTS</b>					
62100 Contracted Services	24,269	51%	30,000	45%	24%
62200 Supplies and Materials	858	2%	2,800	4%	226%
62300 Communications	7	0%	300	0.5%	4061%
62400 Travel	15,667	33%	24,350	36%	55%
62500 Rent	-	0%	-	0%	0%
62700 Repair and Maintenance	-	0%	-	0%	0%
62800 Other Expenses	3,585	8%	3,600	5%	0%
<b>TOTAL OPERATING EXPENSES</b>	\$ 44,387	93%	\$ 61,050	91%	38%
<b>TOTAL EXPENDITURES</b>	\$ 47,746	100%	\$ 67,350	100%	41%

Description

The Board of Regents has full power, responsibility, and authority to supervise, coordinate, manage, and control the Montana University System under Article X, section 9, Montana Constitution, and section 20-25-301, MCA.

The program provides administrative support, travel, and per diem for the board.