



EVALUATION OF INSTITUTIONAL EFFECTIVENESS SELF-EVALUATION REPORT



February 28, 2024

Table of Contents

Instructions on Reading this Report and List of Acronyms	2
Institutional Overview	3
Preface	4
Student Success and Institutional Mission and Effectiveness	6
Standard 1.A: Mission.....	6
Standard 1.B: Improving Institutional Effectiveness.....	7
Standard 1.C: Student Learning	26
Standard 1.D: Student Achievement.....	39
Conclusion	49
Addenda.....	52
Response to findings raised in the peer-evaluation report of the Year Six, Policies, Regulations, and Financial Review (PRFR).....	52
Addendum related to UM's authorization to offer Distance Education programs.....	55
Appendix	57

Instructions on Reading this Report and List of Acronyms

The structure and contents of this report follow NWCCU guidelines. Required addenda are included. The appendix, which follows the addenda, contains additional references.

- Links to additional references are embedded in text throughout the report and appear in **maroon text (not underlined)**. To see a reference, click on the maroon text. To come back to the section of the report you were reading prior to clicking on the reference, press alt + left arrow on your keyboard.
- References to websites appear in **underlined maroon text**. To open a website, click on the underlined maroon text and the website should open in a browser window.

Acronyms are spelled out the first time they appear in each section, then referenced in acronym form for the rest of the section. An alphabetical list of acronyms used in the report is below:

ACE – American Council on Education
AI – artificial intelligence
AISS – American Indian Student Services
BOR – Board of Regents
BSE – Big Sky Experience
CBA – collective bargaining agreement
DAC – Diversity Advisory Council
DEI – diversity, equity, and inclusion
DFW – drop/fail/withdraw
EAC – eLearning Advisory Committee
EFC – estimated family contribution
EIE – Evaluation of Institutional Effectiveness
ELCS – Experiential Learning and Career Success
ERM – enterprise risk management
FERPA – Family Educational Rights and Privacy Act
FTFT – first-time, full-time
FY – fiscal year
HERD – Higher Education Research and Development
HIP – high-impact practice
IPEDS – Integrated Postsecondary Education Data System
KPI – key performance indicator
LA – Learning Assistant
LMS – learning management system
MT10 – Montana 10
MVSO – Military and Veteran Services Office
MT AIMS – Montana American Indians in Math and Science

MUS – Montana University System
NODA - National Association for Orientation, Transition, and Retention in Higher Education
NSSE – National Survey of Student Engagement
NSO – New Student Orientation
NWCCU – Northwest Commission on Colleges and Universities
OCHE – Office of the Commissioner of Higher Education
OIER –Office of Internal Audit and Enterprise Risk
OSPI – Office of Strategic Planning and Implementation
OSS – Office for Student Success
PFA – Priority for Action
PLA – prior learning assessment
PRFR – Policies, Regulations, and Financial Review
SCC – Student Code of Conduct
SOR – strategic operating rhythm
UAAC – University Assessment and Accreditation Committee
UBC – University Budget Committee
UDT – University Design Team
ULC – University Leadership Council
UM – University of Montana
UPWA – University-wide Program-level Writing Assessment

Institutional Overview

The University of Montana (UM) proudly enters its 132nd year as Montana's flagship public research institution. As such, we acknowledge that we are in the aboriginal territories of the Salish and Kalispel people. Today, we honor the path they have always shown us in caring for this place for the generations to come.

Grounded in a founding charter that established UM as a public institution dedicated to serving Montanans through an accessible, affordable education, UM delivers the promise of higher education by transforming lives and creating pathways to meaningful success. The University's tenets of embracing curiosity and creativity to meet the demands of a rapidly changing workforce and economic landscape remain essential for the sustainability of higher education in Montana and for the sustainability of Montana communities. UM recognizes the unique capacity of each individual to effect change and reach their unique, full potential. The roots of the institution established in 1893 therefore continue to nurture a healthy, democratic society through education, research, and service.

Under the Constitution of Montana, the Montana University System (MUS) is governed by an autonomous board of regents, appointed by the governor, and administered by a commissioner of higher education. The University of Montana affiliation within the MUS consists of the University of Montana flagship institution in Missoula, which includes Missoula College and UM Bitterroot in Hamilton; Montana Technological University in Butte; The University of Montana Western in Dillon; and Helena College in Helena. The four campuses are administratively one University affiliation; each retains its own distinctive mission, academic programs, procedures, standards, and accreditation. The scope of this report is limited to the activities of the University of Montana flagship institution.

UM's scenic location in western Montana provides for cultural diversity and rich community engagement. Our campus is undergoing the most significant facilities and infrastructure upgrade in its history, featuring residence hall updates, a new campus dining facility, sustainable heat and power plant improvements, and a new building for the Montana Museum of Art and Culture, a permanent home for the museum and its nearly 12,000-piece collection, founded more than a century ago. UM was awarded R1 Carnegie "Very High Research Activity" Status in 2022. Research expenditures are nearly 40% higher than five years ago, and UM's research expenditures totaled over 122 million in 2023. We are especially proud of Kolter Stevenson, UM senior, Montana resident, and [2023 Rhodes scholar](#).

Spring 2024 enrollment at UM reached 10,349 students, reflecting a stable trajectory of enrollment growth. Headcount was 5,628 at the undergraduate level on the four-year campus; 2,040 at the graduate level; and 2,681 in two-year and/or partnership programs. Of incoming UM students in fall 2023, more than 60% were Montana residents, 25% of undergraduate students were first-generation college students, and

21% were offered Pell grants. UM's 2023 retention rate is 76%, improved by 8% in the last five years. Notably, UM's Native American student enrollment has increased 37% since spring 2019, including a 5% increase from fall 2022, with 715 Native students now enrolled. Veteran student enrollment has increased 13% over the previous year. In 2022-23, UM conferred 1,250 baccalaureate, 512 master's, 70 research doctoral, and 507 professional doctoral degrees.

The University is led by President Seth Bodnar, who joined UM in January 2018. The executive leadership team includes leaders of the eight functional areas that report to the president, referred to as "sectors" in this report: academic affairs; student success and campus life; operations and finance; research and creative scholarship; marketing, communications, engagement and experience; enrollment management; people and culture; and athletics. This team, along with other executives and shared governance leaders, sits on the President's Cabinet, which promotes collaboration and supports the advancement of our institution's mission and vision. UM plans, implements, and assesses mission and vision-aligned projects to help achieve institutional objectives and allocates resources through a proactive and participative process known as the strategic operating rhythm, managed by the Office of Strategic Planning and Implementation. The University Assessment and Accreditation Committee, composed of faculty, staff, and student representatives, as well as administrators, contributed to the preparation of this report.

Preface

This evaluation of institutional effectiveness is submitted on behalf of the University of Montana (UM) and has been written in response to the Northwest Commission on Colleges and Universities (NWCCU) 2020 Standard One, Student Success, and Institutional Mission and Effectiveness. The University has no recommendations from prior reports to address. UM's [last comprehensive report](#) was a 2017 Demonstration Project that assessed student learning outcomes as a measure of mission fulfillment. Since then, in the current accreditation cycle, UM has submitted [self-evaluation \(year 1\)](#), [mid-cycle evaluation \(year 3\)](#), and [policies, regulations, and financial review \(PRFR\) self-study \(year 6\)](#) reports.

Institutional changes since UM's last report

Numerous changes in administrative structure and staffing have taken place at UM since the submission of our last comprehensive report. Many of these changes reflect adjustments to the institution's organizational structure to improve coordination and efficiency. For example, the people and culture sector merges existing functions that support people: Human Resource Services, the Office of Organizational Learning and Development, and the Office for Conflict, Resolution, and Policy. The sector will support UM employees and foster a positive work culture at UM, in support of UM's Priority for Action 3, "Mission First, People Always." Other institutional changes of note include the substantial upgrades to campus infrastructure described in our PRFR report and above.

Deliberate Institutional Strategic Planning and Implementation

The most relevant organizational change to highlight is the creation of the Office of Strategic Planning and Implementation (OSPI). From the start of his tenure at UM, President Bodnar identified the need to establish a mechanism to drive rigorous execution of institutional priorities as well as the need for a predictable, annual operating rhythm that would emphasize continuous improvement in the planning, budgeting, implementation, and assessment components of the University's efforts toward mission fulfillment.

2018 – MT Board of Regents approves UM's mission statement.

2018 – UM defines Priorities for Action.

2020 – University Design Team develops UM's vision statement.

2021 – UM launches OSPI, implements FY 22 Annual Playbook, and pilots SOR.

2022 – OSPI develops and implements FY 23 Annual Playbook and SOR.

2023 – OSPI refines Annual Playbook and SOR processes.

UM finalized its mission statement and established its Priorities for Action (PFAs) in 2018. The PFAs represented UM's "core themes" in prior NWCCU accreditation reports and remain the guiding framework for UM's annual institutional goal setting.

The University's vision statement originates in the work of the University Design Team (UDT), charged in 2020 to explore how the University can best meet our moral obligation to best serve the needs of our students and community, now and in the future. UM's vision statement reads, "The University of Montana will be a Flagship for the Future, fostering inclusive prosperity and democracy while creating new knowledge and ways of learning."

UM is committed to fostering inclusive prosperity for all. This means we aspire to enable people and communities to reach their unique, full potential. To

support the translation of the PFAs, mission, and vision into tangible actions, the University established a unit focused on strategy, coordination, operational support, and institutional learning at UM.

UM launched the Office of Strategic Planning and Implementation (OSPI) in December 2021. OSPI supports progress toward institutional goals and cultivates a learning mindset oriented toward continuous improvement. In its third year of operation, OSPI is helping UM's planning, execution, and assessment cultures to mature. OSPI staff support leaders and managers across campus to implement our strategic operating rhythm (SOR), the annual cycle that provides the timelines, tools, facilitation, and transparency required to sustain and further develop UM's focus on mission fulfillment and institutional effectiveness.

Student Success and Institutional Mission and Effectiveness

Standard 1.A: Mission

1.A.1. The institution's mission statement defines its broad educational purposes and its commitment to student learning and achievement.

As Montana's flagship university, the University of Montana (UM) sets a high bar for academics, creative accomplishments, and scientific exploration for the benefit of our students, our community, our state, and the world at large. UM's mission statement was approved in May 2018 by the Montana University System (MUS) Board of Regents (BOR).

UM mission statement

The University of Montana transforms lives by providing a high-quality and accessible education and by generating world-class research and creative scholarship in an exceptional place. We integrate the liberal arts and sciences into undergraduate, graduate, and professional studies to shape global citizens who are creative and agile learners committed to expanding the boundaries of knowledge and to building and sustaining diverse communities.

Our Priorities for Action (PFAs) complement our vision and mission statements as values that guide and influence our objectives, decisions, and actions:

PFA 1: Place student success at the center of all we do. *In all of our decisions and actions, we will put the success of our students first. We will focus on student retention, persistence, and success through graduation and beyond.*

PFA 2: Drive excellence and innovation in teaching, learning, and research. *Our curriculum, pedagogy, and research will evolve and adapt to best prepare students and communities to succeed in a dynamic, uncertain world.*

PFA 3: Embody the principle of "Mission First, People Always." *People make UM successful. We will focus on people's growth and learning, and on fostering a diverse and inclusive campus.*

PFA 4: Partner with place. *We benefit greatly from our natural setting and our connection to our community, state, and region. We will both use and strengthen that asset through collaborative learning opportunities, research, and service.*

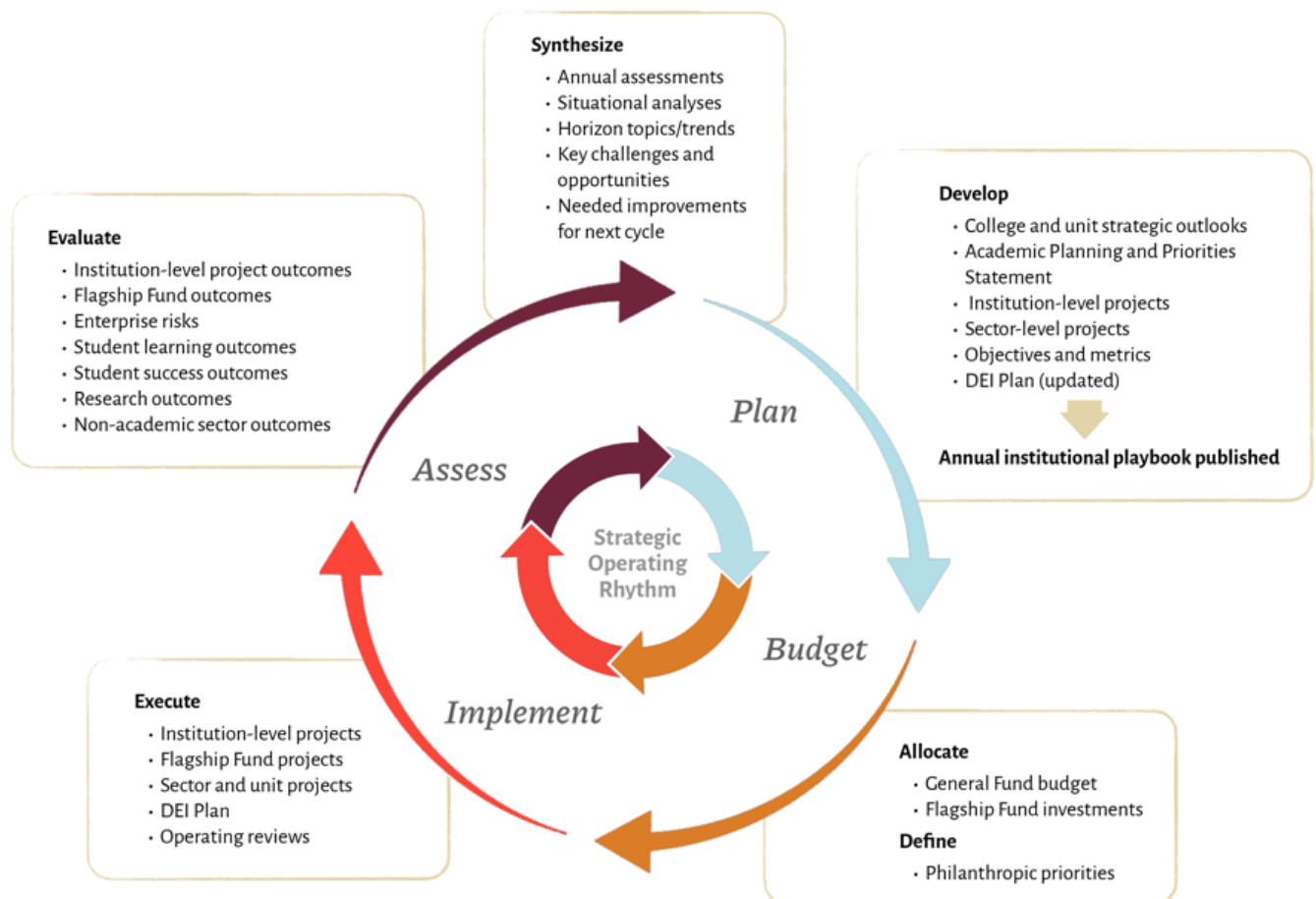
PFA 5: Proudly tell the UM story. *We are an institution whose transformative impact on individual students, Montana, and the world needs to be known.*

We recognize that having a vision and mission statement and a set of institutional values does not mean automatic progress toward mission fulfillment and institutional effectiveness. Our focus on strategy; annually planned actions; making progress tangible; inviting self-reflection; and ensuring accountability brings UM's vision, mission, and values to life in the daily work of the institution.

Standard 1.B: Improving Institutional Effectiveness

1.B.1 The institution demonstrates a continuous process to assess institutional effectiveness, including student learning and achievement and support services. The institution uses an ongoing and systematic evaluation and planning process to inform and refine its effectiveness, assign resources, and improve student learning and achievement.

Overseen by the Office of Strategic Planning and Implementation (OSPI), the strategic operating rhythm (SOR) is an ongoing and systematic planning and evaluation process. The SOR advances the operating performance of the University through **planning** (institutional objectives and projects are defined and adopted); **budgeting** (resources that support institutional objectives are assigned); **implementation** (concerted and regularly monitored actions help achieve institutional objectives); and **assessment** (understanding the outcomes of our planning, budgeting, and implementation helps inform future SOR cycles.)



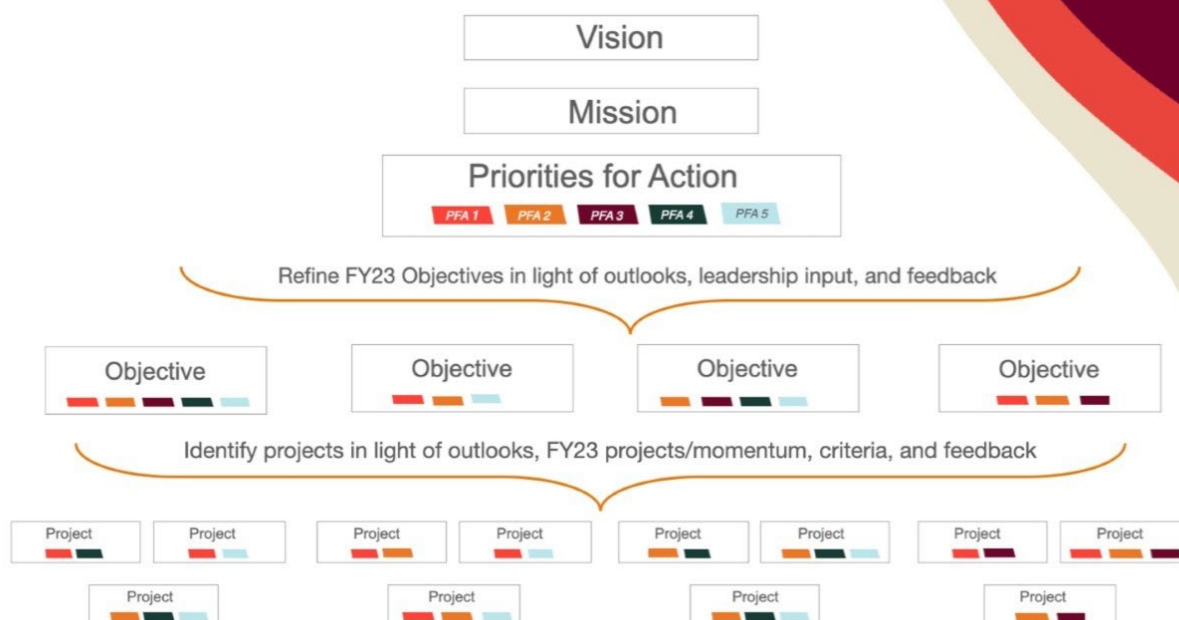
OSPI partners with key University committees (the [University Leadership Council \(ULC\)](#), the [University Budget Committee \(UBC\)](#), and the [University Assessment and Accreditation Committee \(UAAC\)](#)) to coordinate the SOR and its main components. University **planning** and **implementation** functions are articulated each year in the Annual Playbook; meanwhile, institutional **budgeting** and **assessment** functions complement the process.

The University of Montana (UM) has deliberately chosen to take an iterative, annual approach to strategic planning, as opposed to developing longer-term plans that quickly become outdated. OSPI's work facilitating annual planning, budgeting, implementation, and assessment allows us to make steady, tangible progress while keeping an eye on our changing landscape and proactively responding to new opportunities. The institution continues to track meaningful longitudinal metrics associated with our Priorities for Action (PFAs) like those featured in [1.B.2](#), while adopting the focused approach to annual planning described below.

Planning and the Annual Playbook

Couched within the PFA framework, the [Annual Playbook](#) serves as the bridge between the institution's current state and its desired future state. UM's vision, mission, and PFAs guide our institutional efforts over the long term. The Annual Playbook states the

Playbook model



objectives UM will focus on and identifies the institution-level projects¹ for the coming year that advance each objective. As an expression of our commitment to continually improve our institutional processes, the Annual Playbook has evolved: whereas institutional objectives were siloed within PFA categories in Annual Playbooks published in fiscal year (FY) 2022 and 2023, and remained tied to longitudinal metrics historically associated with the PFAs, the FY 2024 Annual Playbook features institution-level objectives and projects that support multiple PFAs and are tied to our **Key Performance Indicators (KPIs)**.

Planning inputs

OSPI staff collect and analyze information from many sources to develop a high-level view of the University's internal, regional, and national environments. OSPI develops the institution-level objectives and projects presented in the Annual Playbook based on: internal and external environmental trends, called "horizon topics;" strategic outlooks from across campus; the University's Diversity, Equity, and Inclusion (DEI) Plan; input from members of the ULC; and more. These are explained in more detail below.

Internal and external environmental trends, called "horizon topics."

As discussed in **1.B.4**, OSPI regularly solicits input from the campus community on internal and external signals of change, e.g. new challenges, or opportunities, to consider in future institutional planning.

Strategic outlooks from campus sectors

OSPI facilitates campus-wide strategic thinking by asking units within campus sectors, including colleges, to submit **strategic outlooks**. Sector leaders also prepare sector-wide strategic outlooks. These documents focus both on the coming year and 3-5 years ahead. They are composed of:

- A reflection of the past year's successes and barriers to progress.
- An assessment of internal longitudinal data and reflections on what trends those data reveal.
- A strengths, weaknesses, opportunities, and threats analysis focused both internally and externally, with data/sources that support the analysis.
- An outline of priorities for the coming year and how they align with the Annual Playbook.

Unit leaders complete strategic outlooks to help sector leaders better understand, support, and allocate resources to the units that report to them. These inform sector outlooks. For instance, unit outlooks from within Student Success and Campus Life helped guide sector-level planning, resource allocation, and action to further objectives focused on student achievement, such as **career readiness** and **student wellness** initiatives. In Academic Affairs, college outlooks informed the **Academic Affairs Playbook** that is currently undergoing established shared

¹ In the FY22 and FY23 Annual Playbooks, the term "strategy" was used to describe efforts undertaken to achieve a specific goal in support of an institution-level objective. In the FY24 Annual Playbook, we changed that term to "project".

governance review and input processes. OSPI staff read all strategic outlooks to gain a comprehensive understanding of unit and sector needs and goals.

UM's Diversity, Equity, and Inclusion Plan (DEI) plan

UM's [DEI plan](#) outlines strategies for building a more inclusive campus culture. The plan was written prior to the creation of the Annual Playbook, and its contents are organized by PFAs. OSPI ensures the plan is updated annually and that it aligns with UM's KPIs. Including the DEI plan in the development of the Annual Playbook ensures UM's DEI efforts are woven into the SOR.

ULC input

The ULC includes executive leadership team members, academic officers, and shared governance leaders (faculty, staff, and student representatives). The ULC's [intent and purpose](#) statement illustrates the Council's role engaging in dialogue on topics that inform the Annual Playbook.

Other inputs OSPI considers for the Annual Playbook

- Activities and initiatives selected for Flagship Fund strategic investment.
- Assessment of progress on initiatives awarded Flagship funds.
- Assessment of past Annual Playbook institution-level objectives and projects.
- UM's enterprise risk management (ERM) inventory.
- UM's most recent Academic Priority and Planning Statement (see [1.C.1](#) for a description of this document.)

Once adopted, the Annual Playbook informs sector and unit-level planning. The playbook for the coming year is presented at a retreat where sector teams identify sector-level goals that support the new playbook's institution-level objectives and projects for the coming year. Units within each sector also identify goals that support institutional objectives and projects. OSPI facilitates workshops to support unit efforts to connect their goals and actions to institution-level objectives. These ongoing conversations enable the University to bring unit- and sector-level efforts into alignment with institutional objectives and drive intentional, coordinated progress.



Budgeting in support of institutional objectives

UM aligns resources with institutional objectives through general fund allocations, strategic investments, and philanthropy.

General fund allocations

Every biennium, the UBC conducts budget planning in support of UM's priorities. The committee considers Montana University System economic and financial projections, the governor's executive budget proposal, the UM annual and biennial budget models, current enrollment, estimated revenue, and expense projections. From this review, the UBC identifies and suggests any needed base adjustments to the budget model, prior to consideration of new budget initiatives or strategic reallocations.

The UBC's work informs general fund budget allocations to each UM sector. Leaders are responsible for distributing the resources allocated to their sectors in ways that support institutional objectives articulated in the Annual Playbook and the sector and unit-level efforts that connect to them. Strategic outlooks apprise sector leaders of unit-level efforts so that they understand the needs and opportunities in the units they oversee. The University Budget Office, a key partner for OSPI, provides resources to help leaders make informed budget decisions that align with institution-level objectives.

Strategic Investments

The [Flagship Fund](#) funnels strategic resources to projects that support UM's PFAs and objectives. In 2021-22, the process focused on Strategic Enrollment Planning (SEP), with a specific emphasis on increasing student enrollment at UM. This process and its outcomes are described further in [1.D.1](#).

The 2022-23 Flagship Fund process took place as an open call for proposals to address a specific need or solve a particular problem; or for revenue-generating ideas that become self-sustaining. [Flagship funds were awarded](#) to 8 proposals that year; 7 additional proposals received were so compelling, other sources of funding were identified for them. All proposals included descriptions, implementation timelines, enrollment and revenue projections (when appropriate), detailed budgets, and evaluation and assessment metrics. OSPI actively tracks the evolution of these proposals and assesses their outcomes, with input from the UAAC.

In [2024](#), the Flagship Fund will award one-year grants of up to \$10,000 to build UM's internal capacity to better utilize generative artificial intelligence, identified as a "horizon topic" for our institution (see [1.B.4](#).)

Philanthropy

The Annual Playbook also shapes the UM Foundation's fundraising focus. [Philanthropic efforts](#) align with PFAs and institutional objectives. Examples include the Grizzly Promise and Payne Family Impact Scholarships for low-income Montana students, support for career development programs, and support for Native American and military-affiliated students.

Implementation

Each institution-level project featured in the Annual Playbook is assigned a project lead and an executive sponsor. OSPI staff work closely with project leads in developing and carrying out an [implementation plan](#) for their project. One of the first steps is a

stakeholder analysis, since projects are more likely to succeed when they include a variety of perspectives and are formed using expertise from multiple sources. Implementation plans include a description, rationale, metrics, and desired outcomes for each project, as well as the actions, timelines, and responsible parties for each project component. OSPI staff help project leads connect their work to institutional metrics by identifying the KPIs the project is intended to impact. Project leads build teams and work with executive sponsors to remove barriers to progress and keep projects on track. Project leads also work closely with OSPI staff, ensuring a robust feedback loop and opportunities to problem-solve if needed.

Progress updates on institution-level projects are regularly presented at ULC meetings, executive leadership team meetings, and academic officer meetings. Meeting agendas for these three leadership groups are designed so that project leads, and their teams, can share information and seek input on effective project implementation.

Assessment

UM conducts institution-level assessment through well-established mechanisms. We have assessed a broad set of institutional indicators for over two full accreditation cycles. These indicators fit within the framework of our PFAs, have been discussed within the context of “core themes” in past accreditation reports, and are presented in [1.B.2](#). The UAAC has historically played a key role in institutional assessment; as OSPI has begun actively driving planning, budgeting, and implementation, the committee’s assessment role has become that of an advisory group. The committee’s [charge](#) was rewritten in 2023 to articulate the committee’s role more clearly as a partner to OSPI.

OSPI staff ensure that institution-level project leads assess whether project metrics and outcomes established for institution-level projects are on track or need mid-course adjustments. At the end of the annual project process, project leads reflect on outcomes and share conclusions with OSPI staff. These reflections inform the next year’s Annual Playbook project lead experience and implementation process.

Established processes within the academic affairs and student success and campus life sectors, discussed in sections 1.C and 1.D of this report, support and sustain assessment of student learning and success. For example, UM periodically participates in the National Survey of Student Engagement (NSSE), which provides us with longitudinal data about student learning expectations and experiences between their freshman and senior years. Self-reported NSSE data, together with data collected by UM’s Experiential Learning and Career Services office informs a strategy described in [1.D.2](#) to encourage more students, especially Pell recipient students, to participate in High-Impact Practices (HIPs) during their undergraduate years.

Enterprise risk management (ERM) complements our established institutional assessment practices. The [Office of Internal Audit and Enterprise Risk](#) (OIER) staff regularly inventory and prioritize enterprise risks, and support risk mitigation planning and implementation. This risk inventory is informed by the experiences of project leads and serves as an input into the development of the Annual Playbook. ERM is often

viewed as a discrete set of activities serving a specific organizational purpose; however, UM deliberately includes enterprise risk in the SOR to make strategic planning, budgeting, implementation, and assessment as comprehensive as possible.

1.B.2 The institution sets and articulates meaningful goals, objectives, and indicators of its goals to define mission fulfillment and to improve its effectiveness in the context of and in comparison, with regional and national peer institutions.

Progress toward mission fulfillment

The University of Montana (UM) established five Priorities for Action (PFAs) in 2018. Nested under UM’s vision and mission, the PFAs provide a framework for our institutional objectives and indicators. UM’s mid-cycle (year 3) report, dating from 2020, articulates 14 objectives, each tied to a Priority for Action, and 38 indicators that align with those objectives. That report outlined metrics for those indicators in 2017-18 and 2018-19 and sets targets for 2024. UM continues to track these indicators while also learning from the process and adjusting as needed.

Our complete updated set of institutional indicators shows the progress UM has made since our mid-cycle report. For various reasons, a handful of indicators were determined to no longer be relevant metrics to track.

Our efforts have, by and large, positively impacted our outcomes. Our 4-year graduation and first-to-second year retention rates improved significantly since 2018, evidence that concerted efforts to support student achievement (PFA 1, Place student success at the center of all we do) yielded intended outcomes.

Improved student achievement outcomes			
Indicator	2018	2024	% change
4-year graduation rate	29.6%	39.1%	32.1%
First-to-second year retention rate	68.5%	76%	10.9%

Source: Office of Institutional Research

In addition, we met or exceeded our targets for these indicators:

PFAs, Objectives, and Indicators (as presented in UM’s mid-cycle report)	FY2017-2018	FY2018-2019	FY2022-2023	2024 Target
PFA 1: Place student success at the center of all we do				
Objective: Students will persist and graduate.				
Four-year graduation rate (FTFT Bachelor-seeking)	29.6%	32.5%	39.1%	37.0%

PFAs, Objectives, and Indicators (as presented in UM's mid-cycle report)	FY2017-2018	FY2018-2019	FY2022-2023	2024 Target
First-to-second-year retention rate (FTFT Bachelor-seeking)	68.5%	71.4%	76.0%	76.0%
Mountain (Main) Campus undergraduate students earning 15+ credits in fall semester/30 credits per year	Fall: 40.0%	Fall: 40.0%	Fall: 54.0%	Fall: 44.0%
PFA 2: Drive Excellence and Innovation in Teaching, Learning, and Research				
Objective: Foster and support innovation and improvement in teaching/learning.				
Number of unique general education courses (UG & G) offered at least one time online during the fiscal year	76	74	119	82
Number of unique students (UG and GR) who took at least one online course during the fiscal year	UG: 4,005 GR: 957	UG: 4,310 GR: 928	UG: 5,225 GR: 1,382	UG: 5,170 GR: 1,110
Total credit hours generated by students solely taking online courses during the fiscal year	11,457	13,024	28,633	15,630
Total credit hours generated during the summer semester	12,952	13,143	16,618	15,900
Number of faculty who participate in training on evidence-based pedagogy, through online courses, participation in faculty inquiry project, or other training	17	71	169	80
Objective: Expand research and creative scholarship.				
Total research expenditures for the fiscal year	\$90.6M	\$104.7M	\$122.8M	\$120M
Total dollars from new grant proposals submitted during the fiscal year	\$231.1M	\$251.4M	\$354.9M	\$290M
Doctoral degrees awarded during the fiscal year	39	51	71	70
PFA 4: Partner with Place				
Objective: Provide robust experiential learning opportunities that engage and promote our setting.				
Percent of students who enrolled in an internship or practicum course during the fiscal year	13.3%	13.7%	17.9%	15.3%
Objective: Drive economic and social prosperity and ecological health through collective work to advance talent and innovation in Missoula, Montana, and Indian Country.				
Number of direct contacts the Broader Impacts Group has had with K-12 students during the fiscal year	31,345	49,952	88,912	54,650

Thirteen indicators did not meet our 2024 targets but showed improvement or negligible change and, therefore, are not areas of concern.

PFAs, Objectives, and Indicators (as presented in UM's mid-cycle report)	FY2017-2018	FY2018-2019	FY2022-2023	2024 Target
PFA 1: Place student success at the center of all we do				
Objective: Students will persist and graduate.				
Degrees awarded (all levels, including certificates)	3,131	3,293	3,101	3,500
PFA 2: Drive Excellence and Innovation in Teaching, Learning, and Research				
Objective: Foster and support innovation and improvement in teaching/learning.				
Total summer enrollment	2,973	3,081	2,989	3,700
Percent of students who score between 3.5 and 4.0 on the University-wide Program-level Writing Assessment	14.8%	15.0%	14.6%	17.0%
Objective: Expand research and creative scholarship.				
Percent of seniors who have taken part in at least one high-impact practice (currently from NSSE)	NA	85.0%	87.0%	90.0%
PFA 3: Embody the Principle of "Mission First, People Always"				
Objective: Employees will be engaged and committed to the institutional mission.				
Employee engagement (out of 7)	New indicator	6.2	6.1	6.3
Turnover rate: Faculty (tenure/tenure-track) - Staff - Contract Professionals	4.5% - 17.7% - 16.7%	3.6% - 13.5% - 13.6%	2.4% - 13.2% - 13.4%	3.5% - 13.0% - 13.0%
Objective: Employees will have robust learning and growth opportunities.				
Employees participating in the University Staff Ambassadors program	New indicator	14	20	23
Objective: Employees and students will create and experience a diverse, inclusive community on one of the safest, most supportive campuses in the country.				
Employees reporting they feel included by the UM community	New indicator	64.1%	66.9%	68.0%
Employees reporting UM has a strong commitment to diversity, equity, and inclusion	New indicator	69.6%	70.1%	75.0%

PFA, Objectives, and Indicators (as presented in UM's mid-cycle report)	FY2017-2018	FY2018-2019	FY2022-2023	2024 Target
Employees reporting they feel safe from accident, injury, or harm while working at UM	New indicator	81.9%	83.5%	85.0%
PFA 4: Partner with Place				
Objective: Provide robust experiential learning opportunities that engage and promote our setting.				
Percent of students who enrolled in a faculty-led education abroad course during the fiscal year	0.3%	0.3%	0.2%	2.3%
Objective: Drive economic and social prosperity and ecological health through collective work to advance talent and innovation in Missoula, Montana, and Indian Country.				
Number of articulation agreements developed with Tribal Colleges	4	8	7	12
PFA 5: Proudly Tell the UM Story				
Objective: Increase enrollment at the University of Montana.				
Number of new undergraduate and graduate students entering the University during the fall semester of the fiscal year	3,104	3,013	3,089	3,380

Three metrics show areas of decline: alumni giving, professional development, and the six-year graduation rate.

PFA, Objectives, and Indicators (as presented in UM's mid-cycle report)	FY2017-2018	FY2018-2019	FY2022-2023	2024 Target
PFA 1: Place student success at the center of all we do				
Objective: Students will persist and graduate.				
Six-year graduation rate (FTFT Bachelor-seeking)	49.9%	48.5%	45.4%	53.0%
PFA 3: Embody the Principle of "Mission First, People Always"				
Objective: Employees will have robust learning and growth opportunities.				
Employees completing professional development activities	New indicator	90.5%	86.4%	93.0%
PFA 5: Proudly Tell the UM Story				
Objective: Create more giving opportunities for alumni.				
Number of alumni who gave to the University during the fiscal year	7,073	6,821	5,549	7,503

- Our 6-year graduation rate has declined by 4.5% since 2017-18; however, the 9.5% improvement in our 4-year graduation rate in the same time period suggests the 6-year graduation rate will soon improve as well. These rates reflect the performance of the 2017 cohort of students for the 6-year graduation rate vs. the 2019 cohort of students for the 4-year graduation rate. We expect the student achievement efforts that bolstered the 2019 cohort's 4-year graduation rate to be similarly reflected in that cohort's 6-year graduation rate.
- The percentage of employees engaging in professional development activities has also declined. Preliminary analysis of an employee survey conducted in fall 2023 shows that 70% of respondents who did not participate in professional development activities were classified staff. This information helps focus our efforts. UM's new people and culture sector brings together in the spirit of PFA 3, "Mission First, People Always." Process is key, but it's nothing without people. This new sector will support UM's employees in their professional development and engage them in a shared purpose as valued contributors to institutional mission and effectiveness.
- The reported number of alumni contributing to support UM has declined to a current rate of 5.5%, converging with national trends for alumni giving to public institutions which now hovers around 5%. More individuals, including alumni, are giving through family foundation and/or through donor advised funds, shifting those individuals out of the count of alumni donors and into the count of corporate and foundation donors. To increase alumni donations, the UM Foundation recently engaged a consultant to assess the annual giving program and help align annual giving strategies with best practices. The Foundation doubled the staff focused on annual giving and developed a new annual giving brand to support growth in overall giving.

Finally, changes in how the University tracks certain indicators limit our ability to compare the data reported in prior reports with the numbers available now, as evidenced below:

PFA's, Objectives, and Indicators (as presented in UM's mid-cycle report)	FY2017-2018	FY2018-2019	FY2022-2023	2024 Target
PFA 1: Place student success at the center of all we do				
Objective: Identify groups that are historically underserved and ensure that we have appropriate support in place to facilitate their success.				
Co-requisite support course success rate (Math and Writing)	M: 77.8% W: 82.1%	M: 81.4% W: 76.7%	M: 71.8% W: 75.2%	M: 80% W: 80%
Percent of developmental, 100-, and 200-level courses participating in Early Alert during the academic year	N/A	44.5%	18.25%	60%
PFA 4: Partner with Place				
Objective: Provide robust experiential learning opportunities that engage and promote our setting.				

PFAs, Objectives, and Indicators (as presented in UM's mid-cycle report)	FY2017-2018	FY2018-2019	FY2022-2023	2024 Target
Percent of students who enrolled in a field experience course during the fiscal year	0.5%	0.4%	22.0%	2.5%
Percent of students who enrolled in a service learning or volunteer course during the fiscal year	5.9%	5.0%	17.7%	7.9%

- Decreases in co-requisite course success rates are due in part to changes in how UM labels co-requisite courses and tracks success rates.
- Adoption of EAB Navigate changed how UM tracks participation in early alert efforts where faculty identify students who need stronger support from advisors.
- Percentages of students who enrolled in a field experience, a service learning, or volunteer course show exponential growth. This change reflects efforts to properly label such courses.

We discuss the evolution of institutional data systems and processes in [1.D.4](#).

Improved effectiveness of internal processes

UM seeks continuous improvement of our process for setting meaningful goals and objectives. The strategic operating rhythm (SOR) is a set of iterative processes designed and adopted to improve institutional effectiveness and render progress toward the achievement of institutional goals more visible. The Priorities for Action (PFAs) continue to provide a framework for UM's strategic thinking. Our institutional objectives now support multiple PFAs, as reflected in our [Annual Playbook](#).

In seeking to make the best use of our resources, we narrowed our focus, and prioritize time and effort to make progress on fewer, more meaningful objectives. We deliberately decreased the number of objectives we are tracking – from 14, described in our mid-cycle (year 3) report, to the eight featured in our [Annual Playbook](#). As described earlier, each objective is supported by three institution-level projects, complete with action-oriented implementation plans with leading indicators, moving us toward our objectives, and assessment plans to make sure our organization continues to learn from experience.

Adjusting indicators and benchmarks as objectives evolve

Between the time of submission of our mid-cycle (year 3) report and this report, UM's strategic planning and implementation capacity and activity has grown tremendously. The indicators listed above were tracked for over two accreditation cycles and framed in the context of UM's "core themes" in prior accreditation reports. UM's Priorities for Action continue to guide our long-term direction and decision making. The conscious choice to update institution-level objectives each year requires us to examine our institutional indicators to ensure we are focusing on the metrics that matter. While we will continue tracking many established metrics, we also identified nine key performance indicators (KPIs). Each of our institution-level projects **supports one or more of our KPIs** (in addition to addressing PFAs). These KPIs were originally identified during the

Strategic Enrollment Planning (SEP) process described in 1.B.3 and have been expanded to include metrics related to more than enrollment. Many of the metrics UM has tracked longitudinally will become leading indicators for our KPIs. By narrowing our focus to a smaller set of KPIs, we can prioritize and sharpen our efforts for greater impact. As UM begins a new accreditation cycle, the University Assessment and Accreditation Committee (UAAC) will review and provide input to the Office of Strategic Planning and Implementation (OSPI) on KPIs, associated indicators, and benchmarks for the coming years.

Peer institution context and comparison

In response to updated accreditation standards, UM created a set of regional and national peer institutions for purposes of peer comparison. The Office of Institutional Research (IR) generated a list of peer institutions for the UAAC's consideration using a statistical model with a set of eight common characteristics and 40 variables from the Integrated Postsecondary Education Data System (IPEDS). From this, the UAAC agreed upon a set of 13 peer institutions. **This summary** explains the peer institution selection process.

The UAAC compared UM's performance to regional and national peers on six indicators that were both part of our mid-cycle (year 3) report and available in IPEDS and Higher Education Research and Development (HERD) data: enrollment, first-to-second-year retention, four-year and six-year graduation rates, degrees awarded, and research expenditures. As shown in the table below, UM's graduate enrollment, doctoral degrees awarded, and research expenditures are higher than peer institution averages. This is a direct result of UM's focus on achieving R1 status in the Carnegie classification system, which we accomplished in 2022. UM's retention and 4-year graduation rates are also higher compared to peer averages.

UM to peer comparison						
	2018-19		2019-20		2020-21	
	UM	peer	UM	peer	UM	peer
Undergraduate enrollment	9,883	11,806	9,259	11,440	8,339	10,999
Graduate enrollment	3,257	2,807	3,435	2,728	3,482	2,810
Retention	71.0%	72.5%	74.0%	75.2%	75.0%	71.2%
4-year graduation rate	27.0%	25.5%	27.0%	25.5%	33.0%	31.6%
6-year graduation rate	49.0%	49.7%	50.0%	47.8%	49.0%	50.9%
Bachelor's degrees awarded	1,489	1,788	1,262	1,832	1,263	1,847

	2018-19		2019-20		2020-21	
	UM	peer	UM	peer	UM	peer
Master's degrees awarded	507	532	496	533	461	510
Doctoral degrees awarded	415	131	500	135	575	130
Research expenditures	\$104,665	\$78,581	\$110,218	\$83,891	\$121,571	\$90,303
<i>Data sources: IPEDS for all except research expenditures. HERD for research expenditures.</i>						
<i>Note: These numbers differ from those discussed in the institutional indicators tables above because they have different sources; IPEDS in this table and OCHE above.</i>						

UM's performance in undergraduate enrollment and awarded bachelor's degrees is lower compared to peer averages. We have placed increased attention on enrollment for the past several years and results are promising. UM's reported IPEDS data shows an increase in undergraduate enrollment from 8,971 in 2021-22 to 9,160 in 2022-23. We anticipate that continued efforts around student retention, which surpassed our peer average in 2021 and reached 76% in fall 2023, will increase the number of bachelor's degrees awarded in the coming years.

As noted in [1.B.1](#), UM participates in the National Survey of Student Engagement (NSSE) every three years. Eight of our 13 peer institutions also participated, giving us an adequate sample for comparison. UM uses NSSE data as an institutional indicator to track HIP participation. The [NSSE 2022 High-Impact Practices report](#) provides a deeper analysis across all HIPs compared to regional and national peers. In this comparison, UM has a higher percentage of engagement in three of the five first-year indicators and all eight of the senior-year indicators.

As our goal-setting and benchmarking processes evolve, we foresee UM's KPIs also evolving to reflect more intense focus on "inclusive prosperity" as a core value in our institutional vision and the upcoming Carnegie Classification's new spotlight on social and economic mobility. In future reviews of peer institutions for comparison purposes, the UAAC is considering the value of establishing different sets of peer institutions for different types of comparisons (e.g., economic diversity, undergraduate student outcomes, research, aspirational, etc.)

1.B.3 The institution provides evidence that its planning process is inclusive and offers opportunities for comment by appropriate constituencies, allocates necessary resources, and leads to improvement of institutional effectiveness.

Inclusive planning process and opportunities for comment

The University of Montana (UM)'s strategic operating rhythm (SOR) is designed to engage representatives from across campus, including shared governance leaders, in

institutional planning processes. The Office of Strategic Planning and Implementation (OSPI) and the UM administration regularly invite and consider input from a variety of campus constituents.

At a high level, three leadership groups engage in the SOR: the [University Leadership Council \(ULC\)](#), the [University Budget Committee \(UBC\)](#), and the [University Assessment and Accreditation Committee \(UAAC\)](#). OSPI ensures its planning processes, which deliberately include input from many sources and stakeholders across campus, are well integrated with the work of these committees.

These committees all include faculty, staff, and student representatives, a reflection of our institution's strong commitment to shared governance. The UM administration values and actively maintains this culture of collaboration through a clear articulation of **roles and responsibilities** and frequent and regular **communication and interactions**. Shared governance representatives participate in high-level conversations related to the SOR and the development of the Annual Playbook. Furthermore, executive leaders have started encouraging faculty, staff, and student senates to develop their own sets of annual playbook-aligned priorities for the year. Governance leaders may elect to consult with the administration in the development of these priorities and share them across campus as they see fit.

The Annual Playbook process

The process OSPI uses to develop the Annual Playbook engages many campus constituents. Playbook objectives and projects are a distillation of numerous inputs, including strategic outlooks from units across campus, assessment of the previous year's projects, Diversity, Equity, and Inclusion (DEI) plan commitments, consideration of external and internal trends, the UM Academic Priority and Planning Statement, Flagship Fund proposals, etc. OSPI invites feedback from members of the ULC on institution-level objectives and projects for the coming year. Executive sponsors, project leads, and project stakeholders ensure broad inclusion of campus constituents in the implementation of the objectives and projects in the Annual Playbook. For example, a significant number of **participants and units** are engaged in the planning, implementation, and assessment phases of the SOR in FY24.

Allocation of necessary resources

The objectives and projects described in the Annual Playbook are clear indications of the institution's focus. As described in **1.B.1**, executive leaders are expected to allocate portions of their general fund budgets to supporting the institution-level objectives and projects that fall under their purview. Leaders allocate both funds and human capital to carry out the sector and unit-level goals and projects identified each year.

The UBC includes vice presidents and deans as well as shared governance and faculty union representatives. The group holds regular meetings that are open to the public. Through their representatives on the committee, campus constituents provide input on UM's fiscal planning and needs; amendments to UM's general fund budget model can originate from campus input. For example, in 2020, the UBC revised the institution's

budget model with the goal of creating a more desirable split of revenues and spending between academic units and administration, while taking into consideration Board of Regents (BOR) targets for expenses related to instruction, academics, and student support. Within Academic Affairs, the new model aimed to better align desired outcomes (e.g., teaching and research) with incentives that drive those outcomes. As campus uses and provides feedback on the implementation of the new model, adjustments have been made. For example, funds were identified for the Provost to use to support new and existing interdisciplinary academic programs.

As discussed in [1.B.1](#), UM launched the [Flagship Fund](#) to ensure strategic projects that align with institution-level objectives and projects are adequately supported. The [Flagship Fund Advisory Group](#) supports proposal development and recommends proposals for funding consideration. The Flagship Fund grew out of the 2021-22 [Strategic Enrollment Planning \(SEP\) process](#), which focused on increasing student enrollment. Since then, the Flagship Fund has become a mechanism to fund strategic proposals. In [2022-23](#), the Flagship Fund awarded funds to proposals that addressed a specific need or solved a particular problem (aimed at quality improvement across campus) and proposals for revenue-generating ideas that become self-sustaining. Funds were allocated to academic affairs, facilities services, information technology, student success and campus life units. The [2023-24](#) Flagship Fund process is focused on building UM's internal capacity to better utilize generative artificial intelligence - one of UM's "horizon" topics, discussed further in [1.B.4](#).

OSPI monitors and assesses the outcomes of projects funded by this strategic mechanism. Starting this year, the UAAC will help monitor and assess the progress of Flagship-funded initiatives, as befits the committee's role supporting institutional assessment.

Lessons learned in designing an inclusive planning process

In the 2022-23 academic year, OSPI worked more closely with campus colleagues to include them in improving components of the SOR. For example, OSPI responded to requests for more timely and frequent support for and consultation with academic affairs leaders as they engage in college-level planning. To facilitate this improvement, OSPI worked closely with the provost and deans during summer 2023 to co-design the strategic outlook template for colleges. College strategic outlooks informed the development of the [Academic Affairs Playbook](#). Following this collaboration with academic affairs leaders, OSPI is now working with all other sectors to co-design updated strategic outlook templates.

Inclusive Stewardship of UM's DEI plan

As discussed in [1.B.1](#), UM's [DEI plan](#) is integrated into the SOR to ensure we regularly assess progress on institutional objectives related to diversity, equity, and inclusion. Building the DEI plan into the SOR helps to cultivate an equity-minded, inclusive standard across the institution.

OSPI staff engage those responsible for DEI strategies to report on their progress and to define their commitments for the coming year. OSPI compiles and updates the [DEI plan website](#) to reflect these changes. Accountable owners named in the DEI plan may choose to engage with the [Diversity Advisory Council \(DAC\)](#) members and student leaders as they seek to define responsive, relevant, and impactful new commitments for the coming fiscal year. Likewise, DAC leaders may invite accountable owners to present on specific DEI plan strategies during DAC meetings. Other campus groups (e.g., shared governance) may also invite accountable owners to report on progress and consider input. President Bodnar and the chief of staff & associate vice president for strategic planning and implementation meet with DAC leaders monthly to monitor progress and discuss emergent issues related to the DEI plan, ensuring its integration in the broader SOR.

1.B.4 The institution monitors its internal and external environments to identify current and emerging patterns, trends, and expectations. Through its governance system it considers such findings to assess its strategic position, define its future direction, and review and revise, as necessary, its mission, planning, intended outcomes of its programs and services, and indicators of achievement of its goals.

The University of Montana (UM) actively surveys internal and external environments, such as the Montana University System (MUS) and the regional and national contexts exerting various influences on higher education in Montana. We consider dynamic political, economic, social, technological, environmental, and legal influences and their potential effects on our institution's goals and operations.

In addition, UM engages with several professional organizations whose research on trends in higher education informs our planning, such as the Educational Advisory Board (EAB)'s Strategic Advisory Services for access to research in academic affairs, finance, research, enrollment, student success, facilities, and information technology. Our president serves on EAB's President's Advisory Council, a body committed to remaining at the forefront of higher education's issues and to leveraging presidential expertise for the benefit of higher education across the country. President Bodnar also served on the national *Taskforce on Higher Education and Opportunity*, which researched challenges facing higher education and mobilized campus teams to form inter-institutional collaborations to address those challenges. Campus leaders' engagement with external environments affecting higher education informs their expectations for UM's strategic planning and risk management. We embrace our obligation to anticipate the many futures for which we should prepare. This is why identification of internal and external trends, challenges, opportunities, and expectations are components of our strategic operating rhythm (SOR) and enterprise risk management (ERM) processes.

"Signals" and "horizon topics"

In 2020-21, the University Design Team (UDT) identified ["signals"](#) from internal and external environments that needed UM's attention. The team focused on learner

demographics, the financial viability of higher education, new ways of learning, and workforce needs as focal points to help us better understand our uncertain future. The Office of Strategic Planning and Implementation (OSPI) has institutionalized the team's signal scanning exercise by embedding it into the SOR and the updating of the Annual Playbook. OSPI works with the campus community to identify "horizon topics" relevant to ongoing strategic planning. In its environmental scanning, OSPI aims to discover early signs of change; identify key drivers shaping our operational environment; understand important development needs; increase preparedness and organizational agility; form a shared understanding of emerging issues; and create future-oriented strategies.

OSPI identifies horizon topics each year through:

- Leadership sessions – at its summer retreat, members of the executive team discuss external pressures and potential opportunities impacting our work; the ULC also generates a list of horizon topics each year.
- Unit-level strategic outlooks – authors are asked to identify internal and external threats and opportunities relevant to their units/focus.
- ERM – this ongoing activity identifies key risk areas and their potential impact on UM's strategic goals.

ULC horizon topics, summer 2023

- ▶ Changing social and consumer expectations
- ▶ Perceptions of higher education and eroding national confidence in higher education
- ▶ Artificial Intelligence (AI): its impacts and opportunities
- ▶ Need for civic renewal and civil dialogue in Montana and our country
- ▶ Loss of learning due to COVID

Sample FY24 institution-level projects that address horizon topics

- ▶ Strengthen prospective student communications and engagement
- ▶ Embed career readiness across the curriculum and co-curriculum
- ▶ Develop a cross-campus effort to model civil dialogue and promote civic and democratic engagement

OSPI uses horizon topics to compose a **summary list of challenges and opportunities** which it integrates into UM's annual planning processes. Horizon topics regularly figure on leadership meeting agendas; they are the focus of professional development sessions for UM employees, and they inform the institution's focus in its annual playbook development process. Impacts and opportunities related to AI have been addressed at leadership meetings, as the topic of **professional development series**, as the focus of **a campus symposium**, and as the criteria for Flagship Fund strategic fund proposals this year.

Local, state, and federal needs and collaboration

UM works closely with local, state, and national governments with the goal of deepening partnerships that align our strengths with statewide and national needs. These partnerships afford the University insight into external threats and opportunities; they lead to funding streams that support our mission. For example, several national defense

priorities translated into significant funding for UM's research enterprise, for civic education efforts, and for critical language programming. In the most recent biennium, UM worked with the Office of the Commissioner for Higher Education (OCHE) to secure \$591 million – a 6.5% increase over the previous biennium – for the Montana University System (MUS). Specific to academic programming, UM secured numerous investments to bolster and expand academic offerings that meet state-wide needs. In 2021, UM secured \$2 million from the Montana Legislature to jumpstart [Accelerate Montana](#), our economic and workforce development partner. To date, Accelerate Montana has provided about 1,550 learners access to high-quality and in-demand education and training to fill the emerging labor needs of the state. They anticipate doubling the number of learners served by the end of 2024.

FY24 institution-level projects

- ▶ Collaborate with federal, state, and industry partners to expand workforce initiatives and strengthen UM's position as the cybersecurity training and education hub for Montana
- ▶ Engage state, federal, and private partners in key research areas, e.g., AI/machine learning, human performance, cyber, biotech, climate, integrated environment, and autonomous systems.

Also, during the 2023 legislative session, UM secured more than \$6 million to launch degree programs and fund other efforts in cybersecurity. In addition to supporting Missoula College as a National Security Agency-designated Center of Academic Excellence in Cyber Defense, these funds will help defend the University's assets against cyberattacks.

The 2023 legislative session yielded important gains for UM's long-range building plan, approving infrastructure projects that support student learning and achievement, including a new building for the W.A. Franke College of Forestry and Conservation and the refurbishment of one of UM's principal science facilities, the Charles H. Clapp building. As part of the campus renovations described above, UM has seized opportunities at the state and national levels to make transformative changes in support of student learning infrastructure and to meet campus needs.

The above efforts relate to several FY24 institution-level projects. Assessment of these projects will help us learn more about responding to external needs. As the SOR matures, coordination between environmental scanning and institutional goal setting will improve and help UM function as a knowledgeable and proactive institution, rather than an unprepared and reactive one.

Standard 1.C: Student Learning

1.C.1 The institution offers programs with appropriate content and rigor that are consistent with its mission, culminate in the achievement of clearly identified student learning outcomes that lead to collegiate-level degrees, certificates, or credentials and include designators consistent with program content in recognized fields of study.

The University of Montana (UM)'s academic portfolio is governed and maintained by the Faculty Senate; by the Office of the Provost; and by the Office of the Commissioner of Higher Education (OCHE), under the authority of the Montana University System (MUS) Board of Regents (BOR). OCHE collects Academic Priority and Planning Statements and lists of Forthcoming Academic Proposals from MUS institutions every year. In these documents, institutions articulate their academic priorities and demonstrate alignment with mission and institutional goals. The documents are posted on the [OCHE website](#) and shared among system Chief Academic Officers. They are discussed at monthly meetings to facilitate communication across the system, alleviate conflict, and reduce program duplication.

New academic programs

The Faculty Senate's review of curriculum ensures the content and rigor of proposed programs and student learning outcomes meet current academic policy and that disciplinary standards are articulated clearly. Faculty Senate committees vet curriculum proposals against the Senate's [established curriculum procedures](#) and present their recommendations to the full Senate. Once approved by the Faculty Senate, the Office of the Provost, which oversees all academic units, prepares curricular proposal submissions for OCHE to provide to the BOR for review and approval.

For every new program proposed to OCHE, UM must clearly demonstrate how the program meets current student, state, and workforce demands. Program proposals must articulate a connection to institutional strategic goals; include student learning outcomes; state how student learning will be assessed; name existing and needed resources to successfully run the program; and provide a financial analysis on projected program viability. These requirements are meant to help programs succeed; additional mechanisms are in place to check that new programs meet the enrollment targets originally envisioned. OCHE tracks program enrollments and may request improvement plans if they don't meet projected targets. If there is no improvement after five years, OCHE may recommend a program be placed in moratorium.

Existing academic programs

Per [BOR policy 303.3](#), UM regularly reviews all degrees, minors, and certificates composed of 29 credits or more. The Office of the Provost coordinates program review and ensures robust discussion between faculty members, chairs/directors, deans, external evaluators, and others on program quality, student learning outcomes, assessment, and program resources. Externally accredited programs undergo the reviews required by their accrediting body, which review student learning outcomes and

assessment and the strength and viability of each program. The Office of the Provost and BOR acknowledge these as meeting program review requirements.

Academic portfolio review process

Part of the impetus for the [Academic Affairs Playbook](#) is the need to attend to the health and viability of our academic portfolio. The Office of the Provost developed a comprehensive annual academic portfolio review process that provides academic leaders with key data to inform decision-making. Academic portfolio review reports use enrollment and graduation metrics tracked by the Board of Regents (BOR). Future reviews will include metrics that align with the goals of the Academic Affairs Playbook and are linked to institution-level objectives. Academic leaders will use this information to:

- Identify 2-year, undergraduate, and certificate programs needing modification, consolidation, or moratorium to realign degrees offered with student demand. (spring 2024).
- Identify program curricular complexity impacting student time and credits to degree and 6-year graduation rate. (2024-2025).

Lessons learned in the first two years of review will inform action in subsequent years. Academic portfolio review will be integrated into the seven-year program review and institutional accreditation cycles. It will become part of day-to-day operations, as the academic affairs sector consistently assesses its productivity and refines its degree offerings to best serve UM students and their future success.

1.C.2 The institution awards credit, degrees, certificates, or credentials for programs that are based upon student learning and learning outcomes that offer an appropriate breadth, depth, sequencing, and synthesis of learning.

The [general education program](#) is the required foundation for the University of Montana (UM)'s undergraduate offerings. The program provides undergraduate students with a flexible yet structured academic foundation. The General Education Committee of the Faculty Senate conducts rigorous review, focused on student learning outcomes and assessment of student learning, for courses intended for general education credit. This foundation helps prepare undergraduates for the upper-level coursework required to complete their degrees.

The Faculty Senate's [majors policy](#) requires all degrees and credentials at UM, including majors, minors, certificates, and concentrations at the level, to have a coherent sequence of courses within the discipline. Academic quality of graduate programs is maintained in a similar manner, as described in [1.C.9](#). Programs with external accreditation define degree requirements and limitations based on the standards of their profession. The Office of the Provost requires academic units to submit curriculum maps with each [program assessment](#) cycle. Combined, these Faculty Senate, Office of the Provost, and Graduate School efforts, as well as externally accredited program requirements, ensure the appropriate breadth, depth, sequencing,

and synthesis of learning across undergraduate and graduate programs, including certificates.

1.C.3 The institution identifies and publishes expected program and degree learning outcomes for all degrees, certificates, and credentials. Information on expected student learning outcomes for all courses is provided to enrolled students.

The biennial program assessment process managed by the Office of the Provost requires academic units to provide program learning outcomes and curriculum maps. Program assessment reports are published and regularly updated by the Office of the Provost on its [Department Reports website](#). Understanding that students do not typically look for this information there, the Office of the Provost is working with the Registrar to add program learning outcomes to the UM Course Catalog.

Expected student learning outcomes for all courses are published in the [MUS Common Course Numbering \(CCN\) Course Guide](#), a repository for all courses and outcomes in the MUS. The learning outcomes for UM courses in this guide are updated on a regular basis by the Faculty Senate, which reviews and approves new and revised courses. As shown in these sample [course syllabi](#), expected student learning outcomes are displayed prominently.

Collective Bargaining Agreements (CBAs) section 6.200 requires “all faculty members [to] prepare a syllabus for each course they teach. A current copy of each syllabus will be placed in an electronic data base for access by students.” The Maureen and Mike Mansfield Library collects course syllabi in [ScholarWorks](#). Most colleges provide syllabi to the Library for ScholarWorks, while others store them in college-specific databases and departmental/college web pages. Though a single repository is not used, all academic units regularly collect syllabi for students to access using systems that are well-established and known by faculty, staff, and students.

1.C.4 The institution's admission and completion or graduation requirements are clearly defined, widely published, and easily accessible to students and the public.

UM's undergraduate admissions requirements are clearly defined, widely published, and easily accessible to students and the public on the [Admissions website](#). The ["Apply" webpage](#) directs students to detailed requirements and application instructions for all UM programs, including undergraduate, graduate, transfer, online, international, law, pharmacy, and physical therapy. [The Missoula College website](#) also outlines requirements and application instructions for those interested in a 2-year degree, certificate program, or transferring to a 4-year institution. In addition to published requirements, students can easily [contact admissions counselors](#) for information. The [Academics website](#) supports prospective students' exploration of programs of study, including co-curricular and experiential learning opportunities.

Undergraduate completion and graduation requirements are published in the [UM Course Catalog](#). Students may also utilize [Degree Works](#), an electronic degree audit system that feeds from UM's Student Information System (SIS), Ellucian Banner, to

track their progress toward degree completion. UM is expanding utilization of Degree Works, creating the [Responsive Dashboard](#) to help academic advisors support students as they complete their degrees.

At the graduate level, prospective UM students and the general public access [program offerings](#) and clearly defined steps for admission to UM's graduate programs via the [Graduate School webpage](#). UM recently extended Slate, the centralized, electronic admissions platform used for undergraduate admissions to graduate admissions. Sharing a common platform improves both recruitment and on-campus support for prospective graduate students.

Graduate and professional program requirements for degree completion and policies appear in the [UM Course Catalog](#). To facilitate degree completion and transparency for students, as well as efficiency in work processes, all graduate degree requirements are being added to Degree Works. That process began in fall 2023 and is 50% complete at time of submission.

1.C.5. The institution engages in an effective system of assessment to evaluate the quality of learning in its programs. The institution recognizes the central role of faculty to establish curricula, assess student learning, and improve instructional programs.

UM's academic units engage in ongoing assessment of program learning outcomes. The Office of the Provost coordinates program assessment every other year, including [resources](#) on assessment best practices and [training](#) for report authors. For the programs they offer, academic units are encouraged to:

- Review the feedback provided during the last assessment cycle, which identified areas of strength and areas for improvement.
- Highlight examples of how assessment data were used to revise any aspect of a program, i.e. demonstrate how data informs future actions (close the loop).
- Highlight how program learning outcomes overlap with institutional (general education) learning outcomes like writing, critical thinking, etc.

The Office of the Provost provides an [assessment report template](#) that includes sections on student learning outcomes and measurement tools, results and modifications, and future plans for continued assessment, as well as a [curriculum map template](#).

Members of the [Assessment Advisory Committee \(AAC\)](#) form teams of two to review and discuss the assessment reports. Prior to review, the committee agrees on the [scoring tool](#) to be used and holds a norming session to ensure all reviewers use the tool in a consistent manner. AAC teams score each assessment report and draft feedback to department chairs/directors and their deans on program assessment practices and results. The AAC chair reviews all completed rubrics and feedback before providing it to department chairs and deans with an [accompanying explanation](#) of the process. Feedback is provided in a timely manner so that academic unit faculty can discuss and apply feedback in time for the next academic year.

In 2023, a subgroup of the AAC also mapped program learning outcomes to UM's institutional (general education) learning outcomes as well as career-readiness competencies. [This chart](#) shows the overlap between program and institutional learning outcomes at UM. Programs are already incorporating many elements or career-readiness in their curriculum, which supports efforts to incorporate career readiness competencies in course learning outcomes, described in [1.C.6](#).

The Office of the Provost publishes assessment reports and accompanying curriculum maps on its [Department Reports website](#). Scoring rubrics and written feedback are not published online; however, they are kept in Office of the Provost files for future reference and are shared with academic units upon request.

Following the 2022-23 biennial assessment cycle, the AAC submitted recommendations on improving the process to the provost, which included:

- Standardizing assessment terminology to ensure consistent use of terms and the creation of a glossary to support shared understanding.
- Increasing follow-up to support implementation of the AAC's feedback before the next reporting cycle.
- Investing in UM's assessment culture through targeted support for academic units in need of assistance.

The Office of the Provost is working with department chairs/directors to implement the AAC's feedback prior to the start of the 2024-25 assessment reporting cycle.

[1.C.6 Consistent with its mission, the institution establishes and assesses, across all associate and bachelor level programs or within a General Education curriculum, institutional learning outcomes and/or core competencies. Examples of such learning outcomes and competencies include, but are not limited to, effective communication skills, global awareness, cultural sensitivity, scientific and quantitative reasoning, critical analysis and logical thinking, problem solving, and/or information literacy.](#)

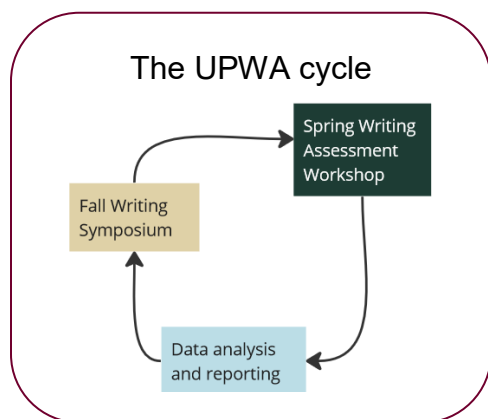
The General Education Committee and the Writing Committee, both subsets of the Faculty Senate, have significant roles in assessing institutional learning outcomes. The General Education Committee conducts rolling review of courses with general education designations that ensures regular assessment of learning outcomes. The rolling review of general education course learning outcomes and assessment ensures courses with the general education designation fit within UM's groupings for general education requirements: English writing skills; mathematics; modern and classical languages; expressive arts; literary and artistic studies; historical studies; social sciences; ethics and human values; democracy and citizenship; cultural & international diversity; and natural sciences.

Per the Faculty Senate's [Procedure on Review and Assessment of General Education Courses](#), instructors must provide evidence of active assessment of learning outcomes in order for their course to maintain its general education designation. They must provide evidence of using discipline-appropriate methods, their findings, and a narrative reflecting on outcomes and future modifications.

The Writing Committee evaluates the general education writing curriculum and supports the instructors of courses that fit within the English writing skills group of UM's general education requirements. The committee reviews new course proposals, existing courses, and assessment reports to ensure that UM's diverse writing course offerings meet required learning outcomes. The committee provides support for instructors of writing courses, works closely with the UM Writing and Public Speaking Center, and reviews transfer appeals. The Writing Committee is a key partner in UM's most significant assessment of institutional learning outcomes, the University-wide Program-level Writing Assessment (UPWA).

The University-wide Program-level Writing Assessment (UPWA)

The University-wide Program-level Writing Assessment (UPWA) has been the primary institutional learning outcome assessment at UM since 2013. The UPWA provides relevant information about student writing proficiency by assessing and scoring student-revised papers from general education intermediate writing courses, which share a few attributes, including unified learning outcomes.



The UPWA's annual cycle distinguishes it from other writing assessments. Each fall and spring semester, all students in intermediate writing courses take a short survey and submit their work to the UPWA. A set of anonymous writing samples is selected, read, and scored by volunteers at the Spring Writing Assessment Workshop. Small groups of faculty, staff, and administrators engage in hearty, cross-disciplinary conversations to score and code the writing samples. The scores and codes generate data that is analyzed to document and better

understand the writing practices taking place across disciplines in intermediate writing courses at UM. This information helps the UPWA coordinator select the topic of the Fall Writing Symposium, a professional development event for instructors focused on practical problem-solving in the higher education writing classroom.

The Fall Writing Symposium is designed to foster discussion about the teaching of writing across disciplines and offer instructors practical applications for locally generated questions about writing. Most recently, the symposium's focus was *Teaching students to find and cite research*. Co-hosted by the Mansfield Library, the event shared concrete strategies for teaching research skills in higher education. Discussion centered on how to get students to value and invest in the work that needs to be done in order to find, integrate, and cite sources for academic assignments. Although the event focuses on a single topic, its power lies in the cross-campus conversations that feed into more general philosophical and logistical questions about writing in higher education.

Findings from recent years, described in the latest [UPWA Annual Report](#), suggest that the overall character of writing instruction at UM has been enriched by this longitudinal

practice. The UPWA is a proven way to make institution-wide assessment meaningful and useful for the faculty who teach intermediate writing at UM. As a result, our students and overall curriculum benefit from improvements to UM's intermediate writing pedagogy and the quality of our students' experience in these foundational writing courses.

Career competencies as institutional learning outcomes

UM wants to help students recognize the valuable skills (such as cultural awareness and teamwork) they learn alongside the acquisition of discipline-specific knowledge. Although career-readiness competencies are not yet formally recognized by the Faculty Senate as components of the UM curriculum, efforts are underway to flag the career competencies present in general education courses and degree programs that will help students articulate the value of what they learned at UM, well after graduation.

UM's Experiential Learning and Career Success (ELCS) office helps faculty identify and integrate career-readiness competencies present in the UM curriculum as part of its ElevateU program. Recognizing that faculty buy-in is necessary for this effort, ELCS actively **engages UM faculty** to promote the value of highlighting the career skills present in the undergraduate curriculum. In 2022-23, ELCS used an external grant to fund three faculty fellowships to promote this effort across campus:

FY23 institution-level strategy

- ▶ Establish ElevateU as a signature element of the UM experience

FY24 institution-level project

- ▶ Embed career readiness across the curriculum and co-curriculum

- One faculty fellow focused on highlighting career competencies present in UM's general education curriculum to add value to students' general education experiences. The General Education Committee recently put forth a **motion** to the Academic Standards and Curriculum Review Committee of the Faculty Senate proposing that general education course instructors select 1-3 career-readiness competencies that align with the course; that the competencies will appear on the course syllabus alongside learning outcomes; that the competencies be searchable by attribute in the UM Course Catalog.
- The second faculty fellow focused on helping academic units explore ways to incorporate internships as a means to help build students' career competencies.
- The third faculty fellow identified and developed strategies to integrate career readiness competencies into degree programs. This effort, a branch of ElevateU, **piloted an initiative** to provide academic units with customized levels of support to integrate career competencies as well as high-impact practices (HIPs) in the curriculum. Based on feedback from the School of Public Health and Community Health Sciences, the Department of History, and the Environmental Science & Sustainability program, ELCS and the faculty fellow launched a broader initiative to encourage widespread adoption of these resources and form a community of practice for faculty to exchange ideas about integrating career competencies in their curriculum at the course and program levels.

As an institution-level project, this set of efforts has an implementation plan, including metrics and indicators, which are monitored by the project lead and OSPI staff in the process described in [1.B.2](#).

It's imperative to demonstrate the value of an UM education to students, parents, employers, and the general public. Assessment of career competencies at the program and general education levels will take place, if approved by the Faculty Senate, by adjusting the general education course designation approval process and the program assessment processes described in [1.C.5](#). By directly linking career competencies to the UM curriculum and highlight them in the UM Course Catalog, we expect to help students develop a nuanced understanding how their UM experience connects to postgraduate success.

FY23 institution-level objective

- ▶ Strengthen co-curricular options that support career readiness

FY24 institution-level project

- ▶ Embed career readiness across the curriculum and co-curriculum

1.C.7 The institution uses the results of its assessment efforts to inform academic and learning-support planning and practices to continuously improve student learning outcomes.

A commitment to student learning underscores the University of Montana (UM)'s identity as a public institution serving learners from diverse backgrounds and preparation levels. Implementation of equity-based practices based on assessment efforts is central to some of our most successful student learning and support initiatives. UM tracks a variety of indicators related to student success. Metrics related to student time to degree and retention inform UM's student learning and achievement programs and practices.

The Learning Assistants program

The University's commitment to enhancing evidence-based teaching practices, particularly in courses marked by high rates of Drop/Fail/Withdraw (DFW), is exemplified by the impactful work of the [Learning Assistant \(LA\) program](#).

LAs are students who successfully complete a course and return to the class as volunteers to support peer learning. LAs facilitate discussions, ask thoughtful questions, address misconceptions, and foster a collaborative learning environment. The classroom becomes an active-learning environment where students, LAs, and instructors all work together to understand core concepts on a deep level. Since LAs recently learned the course material, they are well-placed to identify common struggles in understanding course content and help their peers overcome them.

The LA program is growing, with 58 LAs recruited for fall 2023 to support 35 courses and work alongside 30 different instructors. Throughout fall 2022 and fall 2023 semesters, 15 LAs supported two courses with high DFW rates, Linear Mathematics (M 121) and Introduction to General Chemistry (CHMY 121). This was part of a strategic effort to improve student success in these courses. Outcomes show measurable

improvements in DFW rates for all students and underscore the program's significant role in positively impacting student retention.

A 3-year analysis shows the LA program significantly improves outcomes for students in ethnic/racial minority groups. DFW rates for American Indian/Alaska Native, Asian, Black/African American, Hispanic, Multi-racial, and Native Hawaiian and Other Pacific Islander students enrolled in M 121 decreased by 17% over the past three years. For students enrolled in CHMY 121, rates decreased by 24% over the same time period.

DFW rate for all students in M 121 and CHMY 121, 2022-23

	spring 2022	spring 2023	% change
M 121	35%	29%	-6%
CHMY 121	38%	29%	-9%

Source: *DFW Dashboard*

DFW rate for ethnic/racial minority students, 2021-23

	FY 21	FY 22	FY 23	% change
M 121	43%	43%	35%	-17%
CHMY 121	55%	42%	30%	- 24%

Source: *DFW Dashboard*

Based on these promising results, the LA program received Flagship funds to continue advancing its work. In fall 2023, instructors of M 121 and CHMY 121 received a stipend as an incentive to use LAs to support active learning within their courses. These instructors also met as a cohort led by the LA program director to create a community of practice around use of LAs and active learning in these courses. The director offered guidance and feedback through periodic class

observations, and instructors shared ideas and learned from one another's experiences. [This recent story](#) features the LA program as evidence of UM's commitment to enhancing educational outcomes and opportunities through pedagogy.

Adopting the co-requisite model for gateway math and writing courses

UM's shift from the developmental course model to the co-requisite model is another instance of the institution supporting students in earning credit hours toward a degree. Whereas developmental courses do not count toward a degree, co-requisite course credits do. Co-requisites allow students to complete college-level math and writing requirements during their first year of college; make progress toward degree completion; and save time and money. UM has tracked pass rates in co-requisite courses since 2017, when we began shifting from the developmental model to the co-requisite model for gateway math and writing courses. The co-requisite model eliminates exit points for students who are not fully prepared for college-level math and writing courses. Students in co-requisite courses stay on track with their peers, complete the same college-level courses with the same learning outcomes, and are supported by additional class sessions to provide just-in-time instruction along with additional time focused on course content. The average success rates in co-requisite courses in math and writing since these courses' inception at UM have been well over

70%, with hundreds of students across campus, and including our two-year colleges, Missoula College and UM Bitterroot, benefiting each year by saving money and time toward degree completion.

New placement system for math and writing co-requisite students

In addition to adopting the co-requisite model for these courses, UM has developed new placement processes for incoming students based on current research and best practices. Rather than focus on one high-stakes placement test, our new placement systems incorporate multiple measures and give students options to choose from.

Our new math placement system uses students' ACT, SAT, high school GPA, and last math courses taken to determine placement in all math courses below first-semester calculus. For students who do not place into their first credit-bearing math class using those measures, and for students who lack any or recent test scores, we use a holistic placement model that

incorporates personalized learning, immediate feedback, and adaptive learning technology. Students take a diagnostic placement test on the EdReady platform, which assigns them an initial placement level. Based on their performance, EdReady creates an individualized study plan that allows students to work toward a higher-level math course or simply refresh their skills prior to their first math class at UM. In the first

year using this placement method (2022), 27% of students participated in the individualized program. As advisors become more familiar with this model, this percentage of participating students is increasing. In 2023, over 31% of students chose an individualized plan to solidify their math skills while succeeding at a higher level than the one in which they were initially placed.

Similarly, incoming students are placed in their first writing course based on evaluation of their ACT, SAT, AP and IB exam scores. Starting spring 2024, high school GPA is also considered in writing placements. Students who lack test scores also take the writing placement assessment to determine their initial course assignment within a co-requisite writing course, WRIT 101, or WRIT 201; students who wish to challenge their initial placement can take the writing placement assessment, which includes an essay component, for a chance to take a higher-level course. Students who take the writing placement assessment can ask for feedback, revise their essays, and resubmit them if they don't feel their placement matches their skill level. Students who choose not to take

Math placement data, 2022 and 2023

	2022	2023
Number of students who took placement test	654	1,048
Number; percentage of students who chose individualized program	175; 27%	321; 31%
Estimated value of tuition and fees savings to students, using in-state tuition rates	\$122,000	\$166,000

Source: Office for Student Success

the assessment are placed in a co-requisite writing course, to ensure they earn credit toward a degree with support on the side. The [Annual Report of the 2022-23 Writing Placement Assessment](#) features more information on the evolution of the writing placement program and historic trends in writing placement at UM.

UM adapts its placement systems to the changing needs of students. We also make sure that every course a student takes at UM contributes to their degree. As the new placement models are adopted broadly across campus, more students will benefit from them. In addition, robust tutoring is available through [numerous UM programs](#) to help students succeed in gateway math and writing courses. Students gain confidence in their math and writing abilities while making progress toward their degrees, at a potentially reduced expense.

UM is leading the way in this system-wide approach to helping students succeed in gateway writing and math courses. Our new placement model meets the BOR's November 2022 [charge](#) to the Montana University System (MUS) Developmental Education Steering Committee. The model was also featured at the [MUS Co-Requisite Spring Convening](#) hosted at Missoula College in spring 2023 alongside Complete College America and representatives from across the MUS.

1.C.8 Transfer credit and credit for prior learning is accepted according to clearly defined, widely published, and easily accessible policies that provide adequate safeguards to ensure academic quality. In accepting transfer credit, the receiving institution ensures that such credit accepted is appropriate for its programs and comparable in nature, content, academic rigor, and quality.

The University of Montana (UM) evaluates and accepts college-level credits earned at regionally accredited institutions for transfer.

Undergraduate-level transfer credit

The criteria and processes for transfer credit evaluation and acceptance are published in the [academic policies](#) section of the [UM Course Catalog](#) and on the [Transfer Admission website](#). Students within the Montana University System (MUS) can easily transfer credit between institutions, particularly for courses that satisfy [general education requirements](#), thanks to Common Course Numbering, established by the Board of Regents (BOR) and administered by the Office of the Commissioner of Higher Education (OCHE). BOR policies governing transfers in the MUS are published on the [MUS Transfer website](#).

Credit for prior learning

UM uses the [American Council on Education \(ACE\) Military Guide](#) to determine credit based on military training and occupations and awards credit that is ACE-recommended and parallel to coursework taught at the University. In addition, UM has established guidelines for assessing and awarding prior learning assessment (PLA) credits, based on the criteria outlined in [BOR policy 301.19](#). Transfer students from outside the MUS can seek credit recognition and transfer according to the Faculty Senate's [PLA guidelines](#).

Graduate-level transfer credit

Transfer credits for graduate degrees are governed by [the Graduate School's academic policies](#), published on the Graduate School website. These clearly outline the conditions to be met at the [master's](#) and [doctoral](#) levels. The dean of the Graduate School reviews and approves graduate student transfer petitions in accordance with the policies, with the exceptions noted for new policy made to accommodate 4+1, or [accelerated master's](#) degrees in line with national trends. Graduate programs are encouraged to develop a standardized process at the point of admission for communicating transfer petitions to the Graduate School, which requires one semester of satisfactory coursework in the program before approval. Exceptions to policy are granted within the context of the core principles of maintaining degree standards by admitting coursework from commensurate graduate degrees and in relevant areas of research and training.

1.C.9 The institution's graduate programs are consistent with its mission, are in keeping with the expectations of its respective disciplines and professions and are described through nomenclature that is appropriate to the levels of graduate and professional degrees offered. The graduate programs differ from undergraduate programs by requiring, among other things, greater: depth of study; demands on student intellectual or creative capacities; knowledge of the literature of the field; and ongoing student engagement in research, scholarship, creative expression, and/or relevant professional practice.

The University of Montana (UM)'s graduate programs are central to our mission, as graduate students help advance key initiatives in research and creative scholarship, teaching, and community impact. The University is a comprehensive doctorate-granting institution and received classification as a "very high research activity" institution, for which doctoral completion is a key standard, in 2022.

UM's portfolio of 127 graduate degree options includes 25 PhD programs, five professional doctorates, 63 master's and 34 graduate-level certificate programs. Our professional programs provide core capacities for state, local, and tribal governments, as well as businesses, non-profits, and schools in the region. Graduate students produce substantial works of research and creative activity and/or demonstrate competency in advanced professional practices as judged by program standards and evaluation by qualified committee members.

Program quality is assured through external and internal review, Graduate School policies, and Graduate Council (a Faculty Senate committee) curriculum reviews. Graduate programs adhere to national standards and undergo rigorous external program review every seven years. Professional programs are subject to discipline-specific external accreditation reviews on varying timelines. A key participant in the program review process governed by [BOR policy 303.3](#), Graduate Council synthesizes the findings of external reviewers of graduate programs. In addition to reflecting the expertise of external reviewers, these summaries apply common standards across the

institution for mentoring and advising graduate students, as well as maintenance of robust curricular offerings.

As part of the Office of the Commissioner of Higher Education (OCHE) curriculum process described in 1.C.1, UM is developing a three-year post-implementation internal review for new programs, to ensure they meet their goals, maintain high standards, and continue to offer relevant and engaging curricula. Graduate Council performs curriculum and program reviews and consults on Graduate School policy. Individual programs develop specific guidelines, timelines, and policies that align with these core policies, adding discipline-specific expectations and standards as appropriate.

The Graduate Council approves new graduate courses and degree offerings. Graduate Council sub-committees (humanities, professional schools, social sciences, STEM) perform curriculum proposal reviews, which are then approved by the committee of the whole and forwarded to Faculty Senate for final approval. To ensure that a proposed new program meets core mission values, has a rigorous design, and will meet a professional or research demand, program development involves an approval process and concomitant dialogue between and among the individual units, colleges, the dean of the Graduate School, and the provost. The Graduate Council reviews these proposals to confirm they meet the demands of graduate education to innovate, produce new knowledge or art, and advance social and research goals of the institution in a manner distinguished from undergraduate education.

The Graduate School and Graduate Council ensure program admission standards meet institutional minimums, including a four-year baccalaureate degree from an accredited institution and a minimum GPA of 3.0. In recent years, and in consultation with Graduate Council, the Graduate School lifted its long-standing requirement for GRE scores or equivalent tests for all students. This decision was driven by national discussion around the limited predictive value of these tests regarding the success of admitted students.

Standard 1.D: Student Achievement

1.D.1 Consistent with its mission, the institution recruits and admits students with the potential to benefit from its educational programs. It orients students to ensure they understand the requirements related to their programs of study and receive timely, useful, and accurate information and advice about relevant academic requirements, including graduation and transfer policies.

The University of Montana (UM)'s student recruitment and orientation efforts have become more sophisticated in recent years, thanks to strategic leadership of our enrollment management and student success and campus life sectors and their enhanced collaboration with each other and other University sectors. Examples of UM's increased focus on coordinated and integrated student recruitment and enrollment strategies follow.

Strategic Enrollment Planning

The 2021-22 Strategic Enrollment Planning (SEP) process invited proposals on how to strategically invest resources in programs and activities that would boost student enrollment. Of the 16 projects selected for strategic funding, 10 focused on new or enhanced academic programs, two on co-curricular programs, and four were student recruitment and/or retention strategies.

Facilitated by the Office of Strategic Planning and Implementation (OSPI), a detailed action plan (enrollment strategy description, implementation timeline, enrollment and revenue projections, detailed budgets, and evaluation and assessment metrics) was developed for each SEP proposal. Regular check-ins and, when needed, action plan modifications yielded largely positive outcomes for this strategic investment initiative.

Integrated recruitment and enrollment processes

The SEP process helped Enrollment Management collaborate with academic and student success units as well as other campus partners. Close collaboration with Marketing, Communications, Experience, and Engagement produced www.umontana.edu, a website geared exclusively toward prospective students and their families in 2023. This engaging and playful website features information on

SEP results

FY 23 budget	\$717,426
FY 23 expenses	\$488,228
FY 24 revenue	\$910,359

SEP strategies and initial outcomes

10 Academic Program Strategies
▶ 52 net new students against a target of 51
▶ 6 of 10 strategies met or exceeded targets
▶ 1 strategy never launched
2 Co-curricular Program Strategies
▶ 20 new students against a goal of 11
▶ Both strategies exceeded their targets
4 Student Recruitment and Retention Strategies
▶ 3 of 4 strategies exceeded their targets
▶ 1 strategy's launch was delayed

Source: OSPI

FY23 institution-level strategies

- ▶ Develop and begin implementing plan to be the nation's most military friendly university
- ▶ Improve UM website

FY24 institution-level projects

- ▶ Strengthen prospective student communications and engagement
- ▶ Refine and implement strategic admit-to-enrollment process
- ▶ Remove barriers and expand financial access through financial aid, fundraising, and advocacy

academic programs, tuition and costs (including [student consumer information](#)), scholarships, how to apply, and student life. Additional integration between Enrollment Management with other sectors is evident in institution-level projects.

New student course registration and advising

Admitted first-year and transfer students complete the admitted student checklist to confirm their enrollment and provide information that informs core course registration. At this point, student status shifts from “admitted” to “enrolled”. Academic advisors then pre-register incoming first-year and transfer students into core courses for their chosen majors, preferred general education courses, and a First-Year Seminar prior to their arrival for the start of their first semester. Advisors contact students

before they arrive on campus to discuss their initial course schedule; ensure they understand the requirements related to their program(s) of study; discuss possible interests with students who have yet to choose a major; and show them academic planning resources such as [degree maps for undergraduate programs](#), UM Course Catalog sections pertaining to [academic](#) and [graduation](#) requirements, and the [Degree Works degree audit tool](#).

New student orientation and transition to college programs

In fall 2023, the [orientation and transition journey](#) for all new first-year and transfer undergraduate students became a two-step process. First, students complete an interactive, self-paced, and video-based New Student Orientation (NSO) program, specifically designed for our institution and local community. Next, students are asked to attend a five-day welcome program, the Big Sky Experience (BSE), the week before fall classes begin. The BSE engages new students in a community-based project that fosters a heightened sense of belonging and peer commitment. Students participate in team-based projects ranging from trail work and community service, to filming mini-documentaries, to learning to fly drones. UM attributes the increase in student retention since 2019 in large part to the BSE, which won the 2020 Innovative Program

BSE participants retained from fall 2019-spring 2020 at a rate of 89.4%, UM's highest since 2016.

Award for Region 1 from the National Association for Orientation, Transition, and Retention in Higher Education (NODA). Separating NSO and BSE into two distinct programs was a strategic decision; NSO is a low-risk opportunity for students to orient themselves to campus resources and culture on their own; BSE immediately embeds them in our community and physical environment just before the semester begins for a smooth transition to college life in Missoula.

NSO was designed with two goals in mind – to better deliver critical bystander intervention training to incoming students, and to create more catered pathways for transfer students, adult learners, and military affiliated students. Preliminary data shows 67% of traditional first-year students agreed or strongly agreed they feel better equipped to attend classes having participated in NSO, whereas transfer students, military affiliated students, and adult learners responded the same at rates of 70%, 71% and 74% respectively. Our efforts to better support these student populations are already making a positive impact.

First-year Experience Seminar

The First-year Experience Seminar helps students create meaningful connections and develop a sense of belonging at UM. Advisors enroll all first year and transfer students in this one-credit course during their first semester at UM. Students learn about design thinking (innovative problem-solving strategies) and practice applying it to their personal, academic, and career goals.

First-year Experience Seminar participants retained from fall 2022-spring 2023 at a rate of 91.8%, surpassing the institution-wide rate of 88.0%.

Academic advising for undergraduates

All undergraduates are required to meet with their advisor at least once per semester to review their academic progress, discuss future plans, and secure schedule approval prior to registration for the subsequent semester. UM's advising model, described in detail in UM's PRFR report section 2.G.6, ensures robust support for students as they progress toward degree completion.

1.D.2 Consistent with its mission and in the context of and in comparison, with regional and national peer institutions, the institution establishes and shares widely a set of indicators for student achievement including, but not limited to, persistence, completion, retention, and postgraduation success. Such indicators of student achievement should be disaggregated by race, ethnicity, age, gender, socioeconomic status, first generation college student, and any other institutionally meaningful categories that may help promote student achievement and close barriers to academic excellence and success (equity gaps).

As the Office for Strategic Planning and Implementation (OSPI) facilitates progress on institutional-level objectives and projects, our focus on student achievement has intensified. The University of Montana (UM) has established and widely shared the set of institutional indicators around student achievement described in 1.B.2. These overlap with the set of key performance indicators (KPIs) UM adopted more recently. Current student achievement-focused institution-level projects connect to indicators and KPIs as shown in the sampling below:

FY 24 Annual Playbook projects	Institutional Indicators	KPIs
Refine and implement strategic admit-to-enrollment process	First-to-second year retention rate (FTFT Bachelor-seeking)	Undergraduate headcount; Retention rate (1 st -2 nd year)
Remove barriers and expand financial access through financial aid, fundraising, and advocacy	First-to-second year retention rate; Four-year graduation rate; Six-year graduation rate; Degrees awarded	Undergraduate headcount; Graduate headcount; Resident FTE; Degrees conferred; Retention rate (1 st -2 nd year); Graduation rate; Net tuition revenue/student

Peer institution comparisons and disaggregated data

As described in 1.B.2, UM identified a set of regional and national peer institutions for comparison purposes. We use Integrated Postsecondary Education Data System (IPEDS) data to compare UM's performance to peers on broad indicators of student achievement such as graduation rate, first-to-second year retention rates, and degrees awarded by gender, race, and Pell status. For example, a [peer comparison analysis on 6-year graduation rates](#) conducted by the Office of Institutional Research (IR) and endorsed by the University Assessment and Accreditation Committee (UAAC) underscores the importance of UM's efforts to support all students, and in particular, Native American, Hispanic, and Pell recipient students. Analyses like this reinforce the need for scholarships and support programs like those described in the section on retention below.

Separately, for internal use, UM developed an [equity dashboard](#) that enables us to disaggregate indicators of student achievement that are institutionally meaningful, and

FY23 Institution-level strategy

- Develop an equity dashboard that supports efforts to identify and address equity gaps.

conduct self-comparison on a variety of indicators. The dashboard tracks applicants, admits, enrolled, yield, average high school GPA, financial aid offered, cumulative GPA while at UM, average credit completion, average duration of enrollment in graduating students, and cumulative institutional

credits at graduation for first-generation, racial/ethnic minority, and Pell recipient students, as well as students with none of the aforementioned attributes, and students with all three attributes.

The peer comparison and self-comparison efforts described above are consistent with indicators UM tracks and uses for planning, decision-making, and allocation of resources. Various campus units apply disaggregated data to support student achievement, including IR, Alumni Relations, and units within the student success and campus life sector such as the Office for Student Success (OSS), Experiential Learning and Career Success (ELCS), and American Indian Student Services (AISS). These

units regularly use specific dashboards and tools to support student achievement and close equity gaps.

Retention

An internal [5-year retention analysis](#) completed in October 2022 focused on retention from fall to spring semesters. The study identified two distinct reasons students do not retain at UM: academic preparedness and financial need. Research showed students' first-term GPA was a strong predictor of retention from fall to spring semester. The higher the GPA, the more likely the student would stay at UM. The efforts described in [1.C.7](#) (UM's move from developmental to co-requisite courses and use Learning Assistants in high-DFW courses) support first-year student academic achievement and help retain them.

The report also prompted UM to take a closer look at the federal unmet need to better understand our students' financial situations. An internal study conducted by Hanover Research noted that students receiving aid in the amount of \$3,500 or more from UM are 3.5% more likely to stay for a second semester than students who receive no aid. UM launched two scholarships recently to address students' financial needs: the [Grizzly Promise](#) scholarship provides resident Montana students whose families earn less than \$50,000 annually the opportunity to attend UM tuition-free, and the [Payne Family Impact Scholarship](#) helps Montana students who demonstrate significant financial need, but aren't eligible for Pell awards. Each year, UM reviews its financial aid strategy with a view to helping as many students as possible begin and continue their UM journeys.

[Montana 10 \(MT10\)](#) is a program funded by the Montana University System (MUS) at UM and Missoula College, our embedded 2-year college, for Pell recipient/low income², first-time, full-time Montana residents. The program seeks to diminish or remove barriers that students face related to academic momentum, social belonging, and financial support. The program provides participants specialized advising, math and writing courses, and career development workshops in addition to scholarships to reduce tuition and fee costs and a textbook stipend. There are four active cohorts of MT10 students at UM and Missoula College. Early outcomes data indicate that MT10 has dramatically narrowed the retention gap for low-income students. At Missoula College, graduation rates for MT10 students doubled compared to the general population and other Pell recipients.

There are other factors involved in student retention, such as building community and a sense of belonging on campus. Our new

Missoula College Completion Rates – Fall 2020 Cohort

Student population	% completion
MT10	26%
Other Pell recipients	12%
General population	14%

Source: OCHE

² Having an estimated family contribution (EFC) of \$12,500 or less.

student orientation and transition to college programs and First-year Experience Seminar, described in 1.D.1, are important complements to these efforts. In recent years, UM has focused specifically on student retention from fall to spring semester and from first-to-second year. UM achieved an internal record-breaking first-to-second year retention rate this fall with first-time, full-time students retaining at 76%. This represents an 8% increase in first-to-second year retention at UM since 2018.

Persistence and completion

Upgrades to campus advising infrastructure are helping UM support student persistence and completion. EAB Navigate, adopted in 2020, helps advisors accurately scale best practices in advising methods. For instance, “early alert” encourages instructors to notify advisors when students are struggling so advisors can provide targeted, just-in-time support.

OSS is using the findings of a recent audit of academic advising operations to increase efficiency and effectiveness. The audit findings informed a proposal, “A Plan for Excellence in Advising,” awarded \$1.5 million over two years from the Office of the Commissioner of Higher Education (OCHE). The award funds training for advisors on predictive modeling; outreach to encourage more instructors to use “early alert;” and advisor wage increases. OSS is making significant progress in supporting at-risk students and streamlining case management; in improving communication and ensuring FERPA compliance; in embracing technology and fostering collaboration with faculty; and in enhancing advisor recruitment, retention, management, and professional development. We are optimistic that these significant investments in advising will bolster UM student persistence and completion rates.

FY23 institution-level strategy and FY24 institution-level project

- Improve advising through staffing, technology, and partnership

OSS continuously monitors the many data points available to ensure we understand the impact of improved advising practices on student outcomes. For example, OSS correlates advising data with student success outcomes such as persistence rates, which led to the finding that freshman and sophomore students who scheduled one or more appointments with their advisors, and racial/ethnic minority freshman and sophomore students who did the same, had higher fall 2022 to spring 2023 persistence rates (9.4% and 9.9%, respectively) than peers who did not schedule advising appointments.

Postgraduation success

UM restructured career and experiential learning offerings by merging three separate units under Experiential Learning and Career Success (ELCS) in 2020. ELCS secured nearly \$2 million for additional career coach positions, educational platforms to support student career readiness, and scholarships to create more equity in how students access and engage in high-impact practices (HIPs) like internships.

ELCS designed and implemented an institution-wide framework focused on career readiness and postgraduation success called [ElevateU](#). ElevateU is UM's response to public scrutiny of the value of a college degree. The ElevateU framework guides students toward personally fulfilling and financially viable careers. Part of ElevateU amplifies student development of career competencies both in and outside of the classroom. There is opportunity for improvement in helping graduates develop career interests and connect classroom learning with career paths. ElevateU and the efforts described in [1.C.6](#) are actively addressing this.

Since ElevateU started, graduating student survey responses have improved and shown better postgraduate outcomes. For example, the 2022 response rate to UM's First Destination Survey (our survey for new graduates) increased 176% from the previous year, and 82% of graduates reported having a job or enrolling in continuing education, up from 73% the previous year.

In addition, ELCS partners with Alumni Relations colleagues who are revitalizing UM's alumni engagement strategy. A grant from the Strada Education Foundation is helping alumni relations develop its capabilities in analyzing and using alumni outcomes data. Alumni Relations staff are participating in a Strada Outcomes learning cohort that generates new ideas to enhance postgraduate outcomes for UM students and create additional opportunities for alumni. These include better ways to collect alumni insights on workforce and education outcomes, networking events, and expanded career-related resources for alumni and students.

FY24 institution-level project

- Expand and deepen Alumni's campus and community partnerships

Using disaggregated data to close equity gaps

UM's capabilities to disaggregate data have improved in recent years. As IR consolidates information housed in separate platforms into a single, reliable source, our data team works with units across campus to ensure dashboards and other tools present relevant information in useful formats.

Data for Student Equity project

The Data for Student Equity project, funded in part by a grant from the Bill & Melinda Gates Foundation, enables Student Success and Campus Life colleagues to access and analyze data to identify institutional and financial obstacles preventing Native American students from earning their degrees. The main feature of this project is the [Financial Barriers Identifier report](#). AISS staff use this report to identify and assist Native American students with the admit-to-enroll process, course registration, and bill-pay processes. One key feature of this report is that it shows when students have not applied for aid for which they are eligible. This helps staff connect individual students to financial aid. As we know, this increases the probability they will stay enrolled and achieve their academic goals.

High-impact practices dashboard

In spring 2023, UM produced a [dashboard](#) analyzing student participation in HIPs such as internships, service learning, research, and capstone projects. Advances in UM's data capabilities allow ELCS to disaggregate data and identify gaps in HIP participation, then build resources and support to engage students more equitably in these valuable learning experiences. For example, the dashboard showed first-generation students participated in internships in disproportionately higher numbers (38%) based on the overall proportion of first-generation students in the student body (26%). However, Pell recipient students are under-represented in internship participation (15%) based on the overall proportion of Pell recipient students in the student body (18%). Therefore, UM continues to increase the scholarship funding available to students who are in low or unpaid internships. This ensures all students, regardless of financial means, can participate in an internship and grow not only their professional skills, but also the professional networks that will serve them well after graduation.

1.D.3 The institution's disaggregated indicators of student achievement should be widely published and available on the institution's website. Such disaggregated indicators should be aligned with meaningful, institutionally identified indicators benchmarked against indicators for peer institutions at the regional and national levels and be used for continuous improvement to inform planning, decision making, and allocation of resources.

UM's Office of Institutional Research (IR) website includes a [metrics page](#) featuring disaggregated indicators of student achievement. Indicators are aligned with meaningful, institutionally identified indicators that UM has been tracking for over 2 accreditation cycles, such as retention, degrees awarded, and graduation rates for student groups disaggregated by gender, ethnicity, as well as Pell recipient status. IR maintains additional dashboards on the Tableau platform that help UM leaders track student enrollment, retention and graduation rates, degrees awarded, and online and general education program offerings.

Using the list of peer institutions developed for regional and national comparison for accreditation purposes, IR developed [a series of dashboards](#) showing UM's position compared to peer averages in the areas of enrollment and retention, graduation rates, degrees awarded, research expenditures, and financial aid awarded. The University Assessment and Accreditation Committee (UAAC) reviewed and endorsed these dashboards and provided input to IR colleagues on how they might be most useful; namely as one of the inputs the Office of Strategic Planning and Implementation (OSPI) includes in discussions with specific campus leaders to inform planning, decision-making, and allocation of resources. These peer comparison dashboards provide valuable perspective to inform institution-level objectives and projects.

UM's enhanced capacity to generate and utilize disaggregated data based on institutionally meaningful indicators has informed planning and resource allocation in support of student achievement in the instances described in 1.D.2. As the success of

these initiatives grows, we expect to continue using disaggregated data in a pointed fashion to inform planning and resource allocation in ongoing and new efforts to close equity gaps.

1.D.4 The institution's processes and methodologies for collecting and analyzing indicators of student achievement are transparent and are used to inform and implement strategies and allocate resources to mitigate perceived gaps in achievement and equity.

In recent years, the University of Montana (UM) has invested in various platforms, technologies, and training aimed at consolidating data collection, presentation, and dissemination. This has vastly expanded our ability to accurately track a growing number of data sets. Assembling data in an easily digestible format and ensuring campus colleagues accurately interpret and correctly use this information remains a challenge.

Office of Institutional Research (IR) staff work with a variety of campus partners to collect, interpret, and prioritize the publication of data for many different purposes using tools including BANNER, EAB Navigate, Edify, and Tableau. IR is focused on improving both the structure of the institution's published data organization and the points at which people interact with the data. IR established standard definitions for a set of frequently used data elements to create a shared understanding of how to interpret data.

Improving processes for collecting and analyzing indicators of student achievement

Significant improvements in UM's data infrastructure and management system are impacting our processes and methodologies for collecting and analyzing indicators of student achievement. The following examples demonstrate how our data processes and methodologies are evolving.

Tracking success rates in co-requisite courses

UM has tracked success rates in co-requisite courses since 2017. As noted in 1.B.2, our ability to label and track information related to this student achievement indicator has evolved. UM's widespread adoption of the co-requisite model means it's no longer meaningful to compare success rates for students in developmental courses to those for students in co-requisite courses. As a result, an apples-to-apples comparison of success rates in co-requisite courses between 2017-18 and 2018-19 and 2022-23 is no longer possible.

The **co-requisite dashboard** displays information about success rates of all students in co-requisite math and writing courses. The dashboard reflects a new set of attribute codes assigned by the Registrar to co-requisite courses, which makes tracking these courses and the students enrolled in them much easier.

We now compare success rates of students receiving co-requisite support vs. students in the same course who do not receive additional support. We realize this is no longer an analogous comparison due to the level of preparedness of the students entering the course, as one would expect the success rates for the students who do not receive co-

requisite support to be higher. This comparison helps us understand how students receiving co-requisite support perform in co-requisite courses.

Tracking student participation in high-impact practices (HIPs)

Also noted in 1.B.2, our ability to track student participation in high-impact practices (HIPs) has also evolved from 2018 to the present. Originally, courses offering one of the learning measures we now consider HIPs could only be identified by the course numbering – a process which was inconsistently adhered to and prone to human error. As UM started more accurately recording and tracking the impact HIPs have on student success, substantial effort was made to identify courses (and course sections) by attribute code as a particular type of HIP. This resulted in a much larger list of HIP courses with more refined classification. Enrollment in courses with HIP attributes is now tracked consistently term after term.

New course proposal forms require authors to indicate whether the new course should be labeled with a HIP attribute. Faculty Senate reviews and approves new courses, providing another layer of checks and balances in the process. UM is committed to maintaining these improved processes and methodologies as they help us more accurately measure student achievement.

As discussed in the “[high-impact practices dashboard](#)” section of 1.D.2, use of disaggregated data (first-generation students vs. Pell recipient students participating in internships) informs UM’s decision to increase scholarship funding available to students who are in low-paid or unpaid internships so that all students have the opportunity to participate in an internship or other HIPs.

Enhancing data access and data-informed practices

UM recognizes the power of technology in leveraging data to inform decision-making and reach institutional goals, specifically in the realm of student achievement. Use of dashboards and disaggregated data to inform decision-making and resource allocation is becoming more widespread, with colleagues in Student Success and Campus Life leading the way. As discussed above, UM has used disaggregated data to increase student access to HIPs; to assess how advising appointments help retain students; and to demonstrate the positive impacts of Learning Assistants in the classroom. On the other hand, analysis of disaggregated data on student participants in the University-wide Program-level Writing Assessment (UPWA) by gender and first-generation status did not reveal significant patterns for those types of students. Instead, the highest-scored submissions were authored by students who had taken more writing courses at UM, and by students who were farther along on their paths to degree. We include this example to underscore that while sometimes the use of disaggregated data helps develop strategies to help close equity gaps for specific groups, sometimes disaggregated data analysis does not lead to clear conclusions about supporting one group or another. In those cases, developing and applying best practices to support all students is our chosen course of action.

IR is a key partner in the Office of Strategic Planning and Implementation (OSPI)'s efforts to weave data-informed strategy and resource allocation into the strategic operating rhythm (SOR). The IR Director is a member of the University Leadership Council (ULC) and collaborates with ULC members on using IR resources to inform strategy and resource allocation at the institution, sector, and unit levels. OSPI staff actively use IR dashboards when meeting with sector and unit staff to model and promote use of the wealth of knowledge available that can significantly bolster progress toward institutional goals. Through close partnership with OSPI, IR is well placed to foster and sustain a culture of confident data-informed practices that support student achievement at UM.

Conclusion

The numerous activities and initiatives described in this report demonstrate the strides the University of Montana (UM) is making on multiple fronts, in support of mission fulfillment and institutional effectiveness. UM has adopted a mission statement, a set of shared values expressed as our Priorities for Action (PFAs), and a vision statement that establish a shared purpose for our daily work. The Annual Playbook, in its third iteration, helps campus leaders define and focus on attainable goals within defined timeframes. Engaging campus leaders as executive sponsors of playbook projects and trusting them to identify sector-level goals and projects in support of institution-level objectives helps UM employees connect their daily work to the mission of the University. Perhaps more importantly, we now have a shared direction for UM's future as an affordable, accessible institution that provides each person with the opportunity to reach their unique, full potential.

As the strategic operating rhythm (SOR) matures, its efficacy will improve. The Office of Strategic Planning and Implementation (OSPI) supports processes that enable leaders across campus to make informed decisions and prioritize efforts. The team supports the strategic outlook, project implementation, and strategic funding processes; team members actively seek input and ideas on how to simplify the SOR process and support the numerous participants in these processes. OSPI encourages campus to look ahead toward the institution's long-term goals and helps bring colleagues along in the day-to-day accomplishment of small goals that add up to broader successes.

As UM actively seeks to focus on Key Performance Indicators (KPIs), the many institutional indicators we tracked over the years will evolve. OSPI will support the University Assessment and Accreditation Committee (UAAC) and executive leaders in sunseting certain indicators and organizing other indicators under UM's KPIs. The UAAC may update UM's set of national and regional peer institutions for comparison purposes and will continue to conduct peer comparisons and provide them to executive leadership as an input in future strategic planning, and to sector leaders as an input in future sector planning. Sector leaders are actively developing ways to align their focus with institutional objectives. For example, the research and creative scholarship sector

is starting to engage stakeholders in crafting a Research Playbook to align the sector's goals and projects with institutional objectives.

As sector leaders engage in strategic thinking and our data capabilities improve, it follows that campus leaders serve as role models and set expectations for the use of data in decision-making. Campus-wide data definitions, improved data processes and methodologies, and new data visualization capabilities are helping this to happen. The academic portfolio review process will have a significant role in helping academic units understand their connection to institutional KPIs, especially those related to student learning and achievement. A stronger connection between academic degree offerings and student success in attaining those degrees is critical if UM is to use limited resources wisely, with students' benefit at the forefront of all our actions.

Meaningfully engaging academic units in UM's broader planning processes is vitally important and needs improvement as the SOR matures. The Office of the Provost and OSPI are already collaborating to create improved channels for academic unit participation moving forward and to more fully recognize and communicate the robust role our academic units play in mission fulfillment. Deans play a central role in this process.

Understanding comparisons with peer institutions and analysis of disaggregated student achievement data will be key as we update our KPIs to reflect a more focused approach to high-level institutional metrics and benchmarking. OSPI is poised to help campus leaders understand the connection between their functional areas and institutional goals and indicators. Continued collaboration between OSPI, the Office of Institutional Research (IR), and sector leaders will help refine the types of data campus leaders need to develop strategies and actions that support institutional goals. Once leaders feel confident that the data they use for planning and decision-making are valuable, they will ask others in their sectors to use them as well. A shared understanding of the tools and resources available will empower all areas to make progress and row in the same direction.

Throughout this report, text boxes feature institution-level objectives and projects associated with the topics at hand. This shows the alignment between our efforts to meet accreditation standards while carrying out the goals stated in our Annual Playbook. We continue to monitor internal and external factors that might affect efforts we have termed successes. We know that factors outside of our control can complement or undermine our accomplishments, so we strive to embrace uncertainty and cultivate adaptability and resilience in our organization, our employees, and our students.

In a budget environment where 91% of the general fund is budgeted for personnel³, few operating resources are left to support strategic objectives; as a result, existing human time and talent rather than infusion of new monies are most often the resources

³ See slide 4 of this [MUS report on UM's FY 24 operating budget](#).

invested in carrying out institution-level projects. This limits our ability to make transformative institutional change on the annual rhythm that our planning and implementation aims to take place. We plan to build a strategic reserve within our general fund budget to support institution-level strategic initiatives. In the meantime, we have succeeded in raising donor funds and using limited non-general fund monies to support strategic initiatives such as Flagship Fund awards and campus upgrades. A more robust strategic reserve will be necessary to fully support the strategic operating rhythm at its full potential.

UM embraces the ups and downs of being a public flagship university with a complex mission – giving any who want it access to quality higher education and ensuring our students are prepared to succeed post-graduation; operating on the cutting edge of world-changing research and scholarship; and serving our community and state as a place for learning, connection, respectful debate, and understanding. Preparing this report has given us an opportunity to reflect on progress made in recent years. We are inspired to continue important initiatives that serve our students and institution well, and to exercise a strategic, measured, and steady approach to the challenges that remain.

Addenda

Response to findings raised in the peer-evaluation report of the Year Six, Policies, Regulations, and Financial Review (PRFR).

Finding Type 1: Spring 2023 Policies, Regulations, and Financial Review - The following standards are areas substantially in compliance but where improvement is needed. (2020 Standard(s) 2.G.5; 2.G.7)

Response to finding related to Spring 2023 PRFR 2020 Standard 2.G.5

The panel suggested additional improvement was needed as the loan default rate was not easily found and should be more prominently published. In response, we published the loan default rate on our [Student Consumer Information webpage](#), under Financial Aid Information. Links to the Student Consumer Information webpage figure in the top navigation menu of the [Admissions webpages](#) and in the [Tuition and Costs section of the umontana website](#) devoted exclusively to student recruitment.

The screenshot displays the University of Montana's admissions website. The top navigation bar includes links for About, Academics, Admission and Aid, Student Life, Research, Athletics, My UM, and Alumni. A search bar is also present. Below the navigation bar, a large banner image shows a scenic view of a historic building on a hillside. A secondary navigation bar lists various links: Home, Admitted Student Checklist, Next Steps, Apply, Cost and Aid, Parents and Families, Request Info, Meet Your Counselor, Student Consumer Information, Visit Campus, and Student Life. The main content area features the heading "Student Consumer Information" in a large, stylized font. To the right of this heading, there is a brief description: "Find information on financial aid, net price calculator, safety and security and more." Below this text is a prominent button labeled "Student Consumer Information →".

Response to finding related to Spring 2023 PRFR 2020 Standard 2.G.7

UM's Student Code of Conduct (SCC) prohibits acts of dishonesty such as falsification, unauthorized access, and false information (Article V, A). As noted in our PRFR report, UM Online adopted and published extensive guidance on regular and substantive interactions in distance education courses and programs.

UM's student identity verification policy for distance education has been adopted. Its procedure calls for a cross-sector work group chaired by the Director of Institutional Compliance and composed of the Accreditation Liaison Officer (ALO) and representatives from UM Online, information technology, admissions, the Registrar's Office, financial aid, housing, and enterprise risk. The work group bears responsibility for:

- Ensuring the student who registers in a distance education course of program is the same student who participates in the course and receives credit.
- Ensuring student privacy is protected.
- Notifying students at the time of registration of any additional charges associated with verification procedures.

The work group meets regularly to monitor University compliance with student identity verification requirements and will consider questions such as:

- a. How do we currently verify student identity? Are there are new technical options for verifying identity that are in use or can/will be used as UM is adopting or has adopted new technology?
- b. Are we using online proctored examinations or online distance student meetings with faculty that include ways to identify who is participating? If so, how do we ensure privacy - for example meetings are one on one with faculty, not as a whole group, when showing ID.
- c. Are there any new ways privacy is being protected at UM?
- d. Is any new fee required related to verification?
- e. How do we communicate this policy to distance students and faculty?
- f. Does anything we have discussed require a change to current policy and/or procedure?

Work group members determine whether University action is needed to ensure compliance with the student identity verification policy for distance education as well as with 34 CFR 600.02, 34 CFR 602.17, and the NWCCU policy on distance education. The work group is responsible for ensuring any needed actions are implemented and may adjust the set of questions regularly considered based on how UM's methods to ensure compliance with these policies evolves over time. The work group documents its work, especially changes and modifications, which are kept in UM's institutional compliance files.

Finding Type 2: Spring 2023 Policies, Regulations, and Financial Review - The following standards are areas where the Committee identified significant issues, or where the Committee was unable to adequately assess, and recommends the EIE peer evaluation team include evaluator(s) with relevant expertise for review. (2020 Standard(s) 2.B.1)

Response to finding related to Spring 2023 PRFR 2020 Standard 2.B.1

Based on the panel's recommendation, the Student Code of Conduct (SCC) was revised to include a section on student academic freedom. The revision reads:

ARTICLE IV: PROSCRIBED ACADEMIC CONDUCT

All students enrolled at the University of Montana shall enjoy certain academic rights and responsibilities. Students at the University of Montana are expected to practice academic honesty at all times.

ACADEMIC FREEDOM

The University of Montana has had a long tradition of, and a deep commitment to, academic freedom. The welfare and strength of the University and of society at large depends upon the free search for truth and its free expression. To this end the University of Montana shall recognize and protect full freedom of inquiry, research, discussion, study, publication, and, for artists, the creation and exhibition of works of art, without hindrance, restriction, equivocation, and/or reprisal. This right extends to other facets of campus life to include the right of students to speak on general educational questions or about the administration and operation of the University of Montana and Montana University System.

ACADEMIC RESPONSIBILITIES

The concept of academic freedom must be accompanied by an equally demanding concept of academic responsibility. Students are responsible to abide by and fulfill the Academic Policies and Procedures, Degree/Certificate Requirements for Graduation, and General Education Requirements published in the University of Montana Catalog.

The SCC applies to all UM students, both undergraduate and graduate. As a complement to the language in the SCC, the UM Graduate School's statement on diversity, equity, inclusion and belonging mentions academic freedom among the values characterizing its research and intellectual community.

Addendum related to UM's authorization to offer Distance Education programs

For all of the requirements listed below, please see the [response to the finding related to Spring 2023 PRFR 2.G.7](#) above.

- Policies and procedures for ensuring the student who registers in a Distance Education course or program is the same student who participates in the course and receives credit.
- Policies and procedures that make it clear student privacy is protected.
- Notifications to students at the time of registration of any additional charges associated with verification procedures.
- Academic policies and procedures for instructors to implement requirements for regular and substantive interactions in Distance Education courses or programs.

The institution's Distance Education programs are consistent with the mission and educational objectives of the institutions (Standard 1.C.1).

UM distance education programs are consistent with our mission and educational objectives. Distance education programs are developed through a [multi-phase process](#) that ensures curriculum is responsive to the needs of individual students as well as the state of Montana. Distance education provides greater accessibility to higher education; aligns with specific labor market trends and workforce competencies; and encourages the civic and personal development of our students. Academic units offering distance education programs conduct student learning outcomes assessment following the process coordinated by the Office of the Provost as described in [1.C.3](#) and [1.C.5](#).

At the individual course level, UM distance education courses must meet [regular and substantive interaction](#) requirements. UM follows the [Core Principles of Quality for E-Learning Courses in the Montana University System](#) as a framework for course development as reflected in the [Faculty Senate procedure on Principles for Quality Online Courses](#). Faculty members are strongly encouraged to work with instructional designers when developing a distance education course, to further reinforce and integrate the aforementioned policies and quality standards into their curriculum. In addition, UM Online provides self-paced [trainings and resources](#) for faculty members interested in developing distance education courses and programs.

Furthermore, per [BOR policy 303.7](#), UM representatives regularly participate in the MUS eLearning Advisory Committee (EAC). The EAC makes recommendations to the BOR to ensure consistency across MUS institutions with regard to eLearning initiatives, technologies, curriculum, definitions, standards, and data reporting.

Institutions that offer courses or programs via multiple delivery modalities ensure learning outcomes and levels of student achievement are comparable across modalities (Standard 1.C.6).

UM courses delivered via multiple modalities undergo the same Faculty Senate, Office of the Provost, and Board of Regents review as described in [1.C.1](#), [1.C.5](#), and [1.C.6](#).

We rely on these processes to ensure that learning outcomes and student achievement levels are comparable across modalities. However, UM recognizes that the existing processes do not fully address the new standard. We are actively revising the Program Review and Program Assessment processes and transitioning to a new Learning Management System. Our goal is to enhance these processes to become better tools for integrating ongoing assessment into our academic operations. Future program self-studies and assessment reports will require programs to address how instructors meet Regular and Substantive Interaction requirements and assess how the program outcomes align with the [Core Principles of Quality for E-Learning Courses in the Montana University System](#).

Appendix

Table of contents

Changes in administrative structure and staffing since submission of UM's last comprehensive report.....	58
Key Performance Indicators	59
PFA-aligned objectives and efforts in UM's DEI plan.....	59
Strategic Outlook Template	65
ULC intent and purpose	69
Recent philanthropic efforts that align with Annual Playbook objectives and projects	69
Institution-level project implementation plan	71
Updated set of institutional indicators	72
Indicators determined to no longer be relevant to track	74
Each of our institution-level projects supports one or more of our KPIs (in addition to addressing PFAs).....	75
2022 NSSE High-Impact Practices results (excerpts).....	78
UM shared governance roles and responsibilities	81
UM administration communication and interactions with shared governance.	81
Participants and units included in SOR activities, FY 24.....	82
Summary of challenges and opportunities FY 24	83
Sample course syllabi	84
Assessment training	105
Assessment report template.....	110
Curriculum map template	111
Assessment report scoring tool	112
Email to chairs/directors, cc deans explaining program assessment process	115
Excerpt of chart showing overlap between program learning outcomes, general education learning outcomes and career readiness competencies	116
ELCS faculty engagement overview	117
Career-readiness degree integration pilot project.....	118
Motion to include career readiness competencies in general education course learning outcomes	119
DFW dashboard	121
Peer comparison analysis on 6-year graduation rates	122
Financial Barriers identifier report.....	130
Co-requisite dashboard	131
	57

Changes in administrative structure and staffing since submission of UM's last comprehensive report

Changes in administrative structure

2019 – Vice President for Student Affairs position became Vice Provost for Student Success and Campus Life.

2020 – Associate Vice President for Enrollment Management hired; with added responsibilities, this position became Vice President for Enrollment Management and Strategic Initiatives in 2022

2021 – Creation of Office of Strategic Planning and Implementation, led by Chief of Staff and Associate Vice President for Strategic Planning and Implementation

2021 – Expansion of the Office of Internal Audit to include enterprise risk management

2021 – Vice President for Marketing and Communications position; this position became Vice President for Marketing, Communications, Experience and Engagement in 2023

2022 – Senior Advisor for Strategic Innovation position hired

2023 – Executive Director of UM Online position reconfigured as Vice Provost for Educational Initiatives and Innovation

2023- Vice President for People and Culture position hired

In addition to the creation or reconfiguration of the above positions, the following personnel changes have taken place since 2017.

- Six individuals served as provost, including acting, interim, and permanent appointments.
- Three individuals served as vice provost for academic affairs, including an interim appointment.
- Four individuals and co-deans served as deans of the College of Humanities and Sciences, including interim appointments.
- The dean of the libraries has served in an interim capacity since 2019.
- Three individuals and co-deans served as deans of the College of Arts and Media, including interim appointments.
- Three individuals served as dean of the Skaggs School of Pharmacy, including an interim appointment.
- Three individuals and co-deans served as deans of the Alexander Blewett III School of Law.
- Two individuals served as deans of the College of Business.
- Two individuals served as deans of the W.A. Franke College of Forestry and Conservation.
- Two individuals served as deans of the Davidson Honors College.
- The Phyllis J. Washington is currently led by an interim dean.

While several of these changes reflect natural shifts in leadership as unit needs change, some reflect a challenging recruitment and retention environment nationally and locally. Some also reflect the challenging budget environment UM has worked to address over the last seven years, and the ways an environment of constraint places significant stressors on leaders.

Key Performance Indicators

- undergraduate headcount
- graduate headcount
- resident FTE
- degrees conferred
- retention rate (1st to 2nd year)
- graduation rate (6 year)
- net tuition revenue per student
- research expenditures
- employee engagement

PFA-aligned objectives and efforts in UM's DEI plan

Priority for Action 1: Place student success at the center of all we do

Objective 1.1: Retain and support a diverse student population through strategic planning and assessment.
KPIs: Retention rate, Graduate rate, Undergraduate headcount, Graduate headcount, Degrees conferred
Strategy 1.1.1 Develop a holistic and comprehensive Student Success retention plan, informed by unit-level annual assessment results that identifies promising interventions to promote underrepresented and historically underserved student persistence
Strategy 1.1.2 Conduct annual assessments to identify areas for improvement and to inform Student Success retention plan; ensure data is disaggregated to allow for a deeper understanding of differences in outcomes for underrepresented and underserved students
Strategy 1.1.3 Maintain an updated Excellence in Native American Education Plan and develop a regular mechanism for tracking progress
Strategy 1.1.4 Review all student-facing policies and/or procedures through a DEI lens
Strategy 1.1.5 Review student-facing forms for gender identity inclusiveness
Objective 1.2: Retain and support a diverse student population through enhanced training and clear reporting options.
KPIs: Retention rate, Graduate rate, Undergraduate headcount, Graduate headcount, Degrees conferred

Strategy 1.2.1 Establish and continually support an Office of Inclusive Excellence for Student Success
Strategy 1.2.2 Develop and deliver diversity, discrimination, and harassment training for students
Strategy 1.2.3 Provide confidential and easily accessed processes for students and employees to report grievances and discrimination
Strategy 1.2.4 Create a name change case management system and process for all students (and employees)
Objective 1.3: Retain and support a diverse student population through targeted achievement opportunities and hardship mitigation efforts.
KPIs: Retention rate, Graduate rate, Undergraduate headcount, Graduate headcount, Degrees conferred
Strategy 1.3.1 Provide timely access to resources that address students' basic needs
Strategy 1.3.2 Build programming to ensure underrepresented students are connected to internship opportunities and career success activities (ElevateU); increase BIPOC participation in career ready activities and programs
Strategy 1.3.4 Increase participation of underrepresented students in UM's hallmark academic programs (e.g., graduate programs, GLI, DHC, S.E.A. Change, Wildlife Biology, etc.)
Strategy 1.3.5 Increase access to scholarship and waiver opportunities among underrepresented student populations (see PFA 5)
Objective 1.4: Retain and support a diverse student population through inclusive community-building and identity-based resources.
KPIs: Retention rate, Graduate rate, Undergraduate headcount, Graduate headcount, Degrees conferred
Strategy 1.4.1 Ensure student transition, orientation, and onboarding programs are designed with students from underrepresented and underserved populations in mind

Strategy 1.4.2 Invite students into conversations about gender equity and intersectionality through the S.E.A. Change Initiative programming
Strategy 1.4.3 Increase financial support for student-facing diversity and inclusion efforts and annual events
Strategy 1.4.4 Centralize and distribute information regarding campus/community resources and services related to DEI
Strategy 1.4.5 Provide visible and dedicated space on campus for multicultural and underrepresented students and student organizations

Priority for Action 2: Drive excellence and innovation in teaching, learning, and research

Objective 2.1: Encourage diversity, equity, and inclusion in teaching practices, classroom management, and University citizenship.
KPIs: Retention rate, Graduate rate, Undergraduate headcount, Graduate headcount, Degrees conferred
Strategy 2.1.1 Offer faculty, staff, and graduate students professional development opportunities and other resources focused on inclusive teaching practices
Strategy 2.1.2 Examine and revise curricula to be inclusive of cross-cultural/BIPOC and LGBTQ authors/thinkers, and non-western ways of knowing
Strategy 2.1.3 Embed DEI criteria into faculty evaluation committees
Strategy 2.1.4 Revise course proposal forms to make faculty aware of equitable teaching practices resources and encourage a commitment to equitable teaching
Objective 2.2: Encourage diversity, equity, and inclusion through research and creative scholarship.
KPIs: Research expenditures
Strategy 2.2.1 Support DEI-related research, publications, and service

Strategy 2.2.2 Identify DEI-related support for grant-writing and aid those seeking support
Strategy 2.2.3 Provide resources to promote UM research in tribal settings that is equitable, culturally sensitive, and subject to tribal review and input as paramount in recognizing tribal sovereignty

Priority for Action 3: Embody the principle of Mission First, People Always

Objective 3.1: Increase diversity of employee population through strategic recruitment, hiring, and professional opportunity.
KPIs: Employee engagement
Strategy 3.1.1 Implement an updated Affirmative Action Plan to inform our employee recruitment and retention practices
Strategy 3.1.2 Consider diversity and inclusion as factors in designing role descriptions and in recruitment practices
Strategy 3.1.3 Embed diversity, equity, and inclusion responsibilities and performance indicators, as appropriate, into employee (non-faculty) evaluations
Objective 3.2: Retain a diverse employee population by creating a culturally competent and supportive workplace environment.
KPIs: Employee engagement
Strategy 3.2.1 Conduct assessments to identify areas for improvement regarding employee experience and campus climate
Strategy 3.2.2 Establish an expectation for all employees that we are an institution committed to diversity, equity, and inclusion and that all employees have a role to play in this commitment
Strategy 3.2.3 Develop, deliver, and strongly encourage diversity, discrimination, and harassment training for all employees, including an emphasis on how to foster equitable, anti-racist educational environments
Strategy 3.2.4 Develop a central and living repository of self-education materials on anti-bias, anti-racism, and equitable practices

Strategy 3.2.5 Increase financial support for and visibility of diversity and inclusion efforts and annual events (see PFA 1)
Strategy 3.2.6 Provide confidential and easily accessed systems for employee reporting, support, and personnel actions
Strategy 3.2.7 Review institutional policies and procedures through a DEI lens

Priority for Action 4: Partner with place

Objective 4.1: Increase access to programs and activities for historically underserved populations in the region.
KPIs: New learner course completers/credentials conferred, Resident FTE
Strategy 4.1.1 Advertise and where appropriate expand online, 2+2, 4+1, and graduate programs to increase access in rural areas reaching students who may be first-generation, non-traditional and of low socio-economic status
Objective 4.2: Deepen, strengthen, and elevate preexisting partnerships with regional Indigenous communities.
KPIs: Resident FTE
Strategy 4.2.1 Publicly express UM's interdependence with tribal communities and Montana's Indigenous peoples
Strategy 4.2.2 Create meaningful and action-based engagement with Tribal College Presidents through the Council of Presidents
Strategy 4.2.3 Strengthen and expand UM's commitment to the Native American Graves and Protection Act
Objective 4.3: Partner with local and regional DEI-focused organizations to connect and support underrepresented individuals within and between UM and in the community.
KPIs: Retention rate, Graduate rate, Undergraduate headcount, Graduate headcount, Degrees conferred

Strategy 4.3.1 Partner with diverse community organizations to develop a sense of place for underrepresented students attending UM
Strategy 4.3.2 Engage local youth in conversations about gender equity and intersectionality through the S.E.A. Change Initiative (see PFA 1) and the Women's Leadership Initiative
Objective 4.4: Partner with local and regional employers to provide mutually beneficial professional opportunities for underrepresented students.
KPIs: Retention rate, Graduate rate, Undergraduate headcount, Graduate headcount, Degrees conferred
Strategy 4.4.1 Engage with employers to support pathways for underrepresented students to connect with experiential learning opportunities and build career skills while bolstering academic learning

Priority for Action 5: Proudly tell the UM story

Objective 5.1: Tell the UM story to recruit underrepresented students through strategic outreach and marketing.
KPIs: Undergraduate headcount, Graduate headcount, Resident FTE
Strategy 5.1.1 Integrate into UM's strategic enrollment plan efforts to recruit historically underrepresented students
Objective 5.2: Tell the UM story to recruit underrepresented students by cultivating, elevating, and celebrating UM's diversity.
KPIs: Undergraduate headcount, Graduate headcount, Resident FTE
Strategy 5.2.1 Ensure physical representations of diversity on the UM campus and in digital mapping projects
Strategy 5.2.2 Accurately describe and depict images of the diversity of the institution in admissions material and in all marketing and media
Strategy 5.2.3 Develop web content specifically devoted to diversity
Objective 5.3: Recruit underrepresented students through targeted barrier mitigation.
KPIs: Undergraduate headcount, Graduate headcount, Resident FTE

Strategy 5.3.1

Actively push out Financial Aid verification resources

Strategy 5.3.2

Increase access to scholarship and waiver opportunities among underrepresented student populations

Strategic Outlook Template

Strategic planning is an ongoing process that is as important as the product it makes possible. This Strategic Outlook invites you to engage in informed future thinking about the strategic direction of your unit, which is a part of X sector's continuous and strategic planning.

Please look holistically across your unit as you complete this outlook. Please collaborate with your teams to ensure that on-the-ground expertise and external awareness inform this outlook.

CURRENT STATE

Name and title

Functional areas that report to you

Unit Mission, Vision, and Values

Please note if you do not currently have these defined.

Key data

X

Y

Z

Review your unit's data spreadsheet and reflect below on what trends you see. What questions, concerns, or conclusions do these data suggest?

2023-2024 key accomplishments and barriers/challenges

Please list your unit's high-level accomplishments from the past year. Where appropriate, indicate the accomplishments that directly support UM's Playbook Objectives (this will help us assess our progress in aligning institutional effort as well as help us report to our accrediting body).

Accomplishment	Objective Connection (1-8), if applicable

Please list your unit's unique barriers or challenges from the past year.

Barriers/challenges

REFLECTION/SITUATIONAL ANALYSIS

Strengths, Challenges/Weaknesses, Opportunities, Threats

As you consider the below, think about the trends revealed by the above data and your understanding of the current higher ed landscape. Reflect on what you've learned from your professional organizations, higher education organizations and publications, market-driven data, and other relevant external sources.

Strengths

Unit's current strengths

Institutional strengths impacting your unit

Challenges and Weaknesses

Unit’s current challenges and weaknesses

Institutional challenges and weaknesses impacting your unit

Threats

Please list the external threats you see on the horizon. Wherever possible for each threat, list data or cite/link to external sources that demonstrate these are threats.

Threats	Data/External Sources

Opportunities

Please list the opportunities (trends/needs/demands) you see on the horizon. Wherever possible, for each opportunity, list data or cite/link to other external sources of information that demonstrate these are opportunities that might intersect with your unit’s/institution’s strengths.

Opportunities	Data/External Sources
---------------	-----------------------

LOOKING FORWARD

The objectives outlined below should reflect where your unit aims to head, considering the situational analysis above, as well as [UM's Priorities for Action and Playbook Objectives](#).

Unit Objectives, next 3 years

To move toward this aspiration, what 3-5 things do you want to get done for your unit in the coming 3 years?

Objective and description	How will this move your unit toward your aspiration?

Anticipated Barriers/Needs

What barriers or needs do you anticipate in pursuing these objectives? What ideas do you have for mitigating them?

--

Anticipated Adjustments

To enable your unit to focus on the areas outlined above, what adjustments will your unit need to **make**, e.g., staffing changes, redirecting human and fiscal resources, professional development, etc.?

Anticipated Discontinuations

To accomplish your objectives, what will your unit need to stop doing, e.g., discontinuing projects, programs, etc.?

FY25 ACTIONS TO PRIORITIZE

FY25 Actions to prioritize

Considering your long-term objectives outlined above, your fundraising priorities, [UM's Priorities for Action, and Playbook Objectives](#), what actions for FY25?

FY25 Actions to prioritize	Ideal results/evidence of achievement	Feedback needed or desired

ULC intent and purpose

ULC meetings provide leaders of UM’s key strategies an opportunity to share stories and engage in dialogue about their projects. ULC meetings also provide an opportunity for us to collectively consider external opportunities and threats we need to be paying attention to as we design UM for the future.

The purpose is to grow collective awareness of strategic efforts, review progress, identify and remove barriers, and engage in creative and strategic thinking that will guide future work. We have hard, complex work to do to fulfill our mission and achieve our strategic objectives. We can't succeed working in isolation. We need leaders to actively share information and insights, focus collective efforts on critical projects, and engender cooperation across organizational boundaries.

Recent philanthropic efforts that align with Annual Playbook objectives and projects

The University’s annual fundraising efforts align with our vision to promote inclusive prosperity in the form of access for all students, regardless of background. Annually, the

UM Foundation works closely with the President, Provost, and campus units to review and refine fundraising priorities in support of Annual Playbook projects.

For example, the University and UM Foundation invited philanthropic support for several priorities designed to elevate student access and foster student success. A generous \$7.5 million contribution to establish the Payne Family Impact Scholarship is assisting Montana students who don't have the financial resources to pay for college, particularly those who fall outside the Federal Pell Grant eligibility. Other donor funded scholarships are helping support Grizzly Promise, a University program that guarantees students from families that earn \$50,000 or less can attend UM tuition-free for up to eight semesters.

A private foundation grant provided start-up funding for another institutional priority, ElevateU, a campus-wide initiative fostering preparation for careers through exploratory and skill-building opportunities throughout a student's UM experience, including exploration of career pathways, enriching out-of-classroom experiences, development of professional goals, and transition into a career pathway. Other donors provided critical funding to support career development programs in the College of Business, College of Humanities and Sciences, Davidson Honors College, and School of Journalism.

Further advancing the University's commitment to inclusive prosperity, the University and Foundation elevated fundraising efforts to support the success of Native American and military-affiliated students. Since 2019, more than \$800,000 in private support has been given to support engagement of Native American students through programs including Montana American Indians in Math and Science (MT AIMS), the Indigenous First-Year Experience, American Indian Student Services (AISS), Kyiyo Pow Wow, and an Indigenous Peoples Conference. Support for outreach, community-building, and transition services offered by the Military and Veteran Services Office (MVSO) is attracting increased support from the University's donors.

Institution-level project implementation plan**Detailed Project Implementation Plan****CONTEXT****What is the project?**

- Project short name:
- Project:
- Description (3-4 sentences):
- Specific, measurable, and attainable outcomes for this project in FY24:

Why are we implementing this project?

- What problem are we trying to solve, and why is this important now?
- PFA Playbook objective associated with this project:
- Connected PFAs:
- Which institutional [Key Performance Indicators \(KPIs\)](#) will this project affect?
- Primary project interdependencies:

Who needs to be involved in the project implementation process?

- Project lead(s):
- Project executive sponsor(s):
- Project team members:
- Affected parties: (use the [separate tool](#) to consider involvement and stance)

How will we measure success? What metrics will help us know if we are on track or making progress? What metrics will help us know if we've achieved our outcomes? Identify 2-4 indicators/metrics.

Guiding questions to consider: How am I going to use this indicator? How does this indicator relate to/impact the success of this project? Is there enough data in my data source to be significant? If I had to pick three indicators, which would be the most important? Which would have the greatest influence on the KPIs/desired outcomes? What would give me the best information about whether we're making progress?

Project implementation plan in FY 24:

What can you reasonably accomplish in the next year? Consider the key outcomes that you defined above. There is space below for longer-term planning.

List each "Action" and specific steps required to accomplish the action. (see examples below)	Responsible Person	Start Date	Projected Completion Date	Actual Completion Date	Affected Parties	Notes
Action 1:						
Hire additional advisors						
Identify areas of greatest need						
Launch recruitments						
Hire and onboard						
Action 2:						
Fully implement EAB Navigate						
Step 1						
Step 2						
Step 3						
Action 3:						
Expand coordinated care network by increasing faculty and other professionals' use of EAB Navigate						
Step 1						

List each "Action" and specific steps required to accomplish the action. (see examples below)	Responsible Person	Start Date	Projected Completion Date	Actual Completion Date	Affected Parties	Notes
Step 2						
Step 3						

Project implementation plan beyond FY24:

List "Actions" in the longer-term planning process. (see examples below)	Responsible Person	Start Date	Projected Completion Date	Actual Completion Date	Affected Parties	Notes
Action 1: Hire additional advisors						
Action 2: Fully implement EAB Navigate						
Action 3: Expand coordinated care network by increasing faculty and <u>other</u> professionals' use of EAB Navigate						

Updates**December update:**

Progress summary: In a short paragraph, please summarize the project's progress over the semester.

Encountered barriers: Please outline any barriers to progress. This will help us to explore ways to address those barriers.

Needed adjustments: What revisions to the strategy are necessary moving forward? What needs to be added, removed, or done differently in the future?

May update:

Encountered barriers: Please outline any barriers to progress. This will help us to explore ways to address those barriers.

Needed adjustments: What revisions to the strategy are necessary moving forward? What needs to be added, removed, or done differently in the future?

Achievements: What were your most significant achievements in implementing your strategy in FY24?

Lessons: What are the most important lessons you learned through this experience? Consider your experience engaging stakeholders, effecting organizational change, or any other significant aspect of this process that comes to mind.

Updated set of institutional indicators**Objectives and indicators towards mission fulfillment**

PFA's, Objectives, and Indicators (as presented in UM's mid-cycle report)	FY2017-2018	FY2018-2019	FY2022-2023	2024 target
PFA 1: Place student success at the center of all we do				
Objective: Students will persist and graduate.				
Four-year graduation rate (FTFT Bachelor-seeking)	29.6%	32.5%	39.1%	37.0%
Six-year graduation rate (FTFT Bachelor-seeking)	49.9%	48.5%	45.4%	53.0%
First-to-second-year retention rate (FTFT Bachelor-seeking)	68.5%	71.4%	76.0%	76.0%
Degrees awarded (all levels, including certificates)	3,131	3,293	3,101	3,500
Mountain (Main) Campus undergraduate students earning 15+ credits in fall semester/30 credits per year	Fall: 40.0%	Fall: 40.0%	Fall: 54.0%	Fall: 44.0%

Objective: Identify groups that are historically underserved and ensure that we have appropriate support in place to facilitate their success.				
Co-requisite support course success rate (Math and Writing)	M: 77.8% W: 82.1%	M: 81.4% W: 76.7%	M: 71.8% W: 75.2%	M: 80.0% W: 80.0%
Percent of developmental, 100-, and 200-level courses participating in Early Alert during the academic year	N/A	44.5%	18.25%	60%
PFA 2: Drive excellence and innovation in teaching, learning, and research				
Objective: Foster and support innovation and improvement in teaching/learning.				
Number of unique general education courses (UG & G) offered at least one time online during the fiscal year	76	74	119	82
Number of unique students (UG and GR) who took at least one online course during the fiscal year	UG: 4,005 GR: 957	UG: 4,310 GR: 928	UG: 5,225 GR: 1,382	UG: 5,170 GR: 1,110
Total credit hours generated by students solely taking online courses during the fiscal year	11,457	13,024	28,633	15,630
Total summer enrollment	2,973	3,081	2,989	3,700
Total credit hours generated during the summer semester	12,952	13,143	16,618	15,900
Number of faculty who participate in training on evidence-based pedagogy, through online courses, participation in faculty inquiry project, or other training	17	71	169	80
Percent of students who score between 3.5 and 4.0 on the University-wide Program-level Writing Assessment	14.8%	15.0%	14.6%	17.0%
Objective: Expand research and creative scholarship.				
Percent of seniors who have taken part in at least one high-impact practice (currently from NSSE)	NA	85.0%	87.0%	90.0%
Total research expenditures for the fiscal year	\$90.6M	\$104.7M	\$122.8M	\$120M
Total dollars from new grant proposals submitted during the fiscal year	\$231.1M	\$251.4M	\$354.9M	\$290M
Doctoral degrees awarded during the fiscal year	39	51	71	70
PFA 3: Embody the Principle of “Mission First, People Always”				
Objective: Employees will be engaged and committed to the institutional mission.				
Employee engagement (out of 7)	New indicator	6.2	6.1	6.3
Turnover rate: Faculty (tenure/tenure-track) - Staff - Contract Professionals	4.5% - 17.7% - 16.7%	3.6% - 13.5% - 13.6%	2.4% - 13.2% - 13.4%	3.5% - 13.0% - 13.0%
Objective: Employees will have robust learning and growth opportunities.				
Employees completing professional development activities	New indicator	90.5%	86.4%	93.0%
Employees participating in the University Staff Ambassadors program	New indicator	14	20	23

Objective: Employees and students will create and experience a diverse, inclusive community on one of the safest, most supportive campuses in the country.				
Employees reporting UM has a strong commitment to diversity, equity, and inclusion	New indicator	69.6%	70.1%	75.0%
Employees reporting they feel included by the UM community	New indicator	64.1%	66.9%	68.0%
Employees reporting they feel safe from accident, injury, or harm while working at UM	New indicator	81.9%	83.5%	85.0%
PFA 4: Partner with Place				
Objective: Provide robust experiential learning opportunities that engage and promote our setting.				
Percent of students who enrolled in an internship or practicum course during the fiscal year	13.3%	13.7%	17.9%	15.3%
Percent of students who enrolled in a faculty-led education abroad course during the fiscal year	0.3%	0.3%	0.2%	2.3%
Percent of students who enrolled in a field experience course during the fiscal year	0.5%	0.4%	22.0%	2.5%
Percent of students who enrolled in a service learning or volunteer course during the fiscal year	5.9%	5.0%	17.7%	7.9%
Objective: Drive economic and social prosperity and ecological health through collective work to advance talent and innovation in Missoula, Montana, and Indian Country.				
Number of direct contacts the Broader Impacts Group has had with K-12 students during the fiscal year	31,345	49,952	88,912	54,650
Number of articulation agreements developed with Tribal Colleges	4	8	7	12
PFA 5: Proudly Tell the UM Story				
Objective: Increase enrollment at the University of Montana.				
Number of new undergraduate and graduate students entering the University during the fall semester of the fiscal year	3,104	3,013	3,089	3,380
Objective: Create more giving opportunities for alumni.				
Number of alumni who gave to the University during the fiscal year	7,073	6,821	5,549	7,503
Source: various, including Office of Institutional Research and Office of the Commissioner of Higher Education.				

Indicators determined to no longer be relevant to track

*Metrics no longer tracking	Rationale
Percent of Global Leadership Initiative students who score at or above benchmark on the Global Awareness rubric	N is too small to be significant.
Fair to excellent ratings in The Chronicle's "Great Colleges to Work For" survey categories (15 categories total)	N is too small to be significant. UM employee survey has a higher response rate.

Average HSGPA of entering freshmen on the Mountain Campus for the fall semester of the fiscal year	UM strives to be an affordable, accessible institution that provides each person with the opportunity to reach their unique, full potential.
Average test score (ACT) of entering freshmen on the Mountain Campus for the fall semester of the fiscal year	Like many universities, UM has become a test-optional institution.
Number of earned media placements during the fiscal year	The measurement tool used for this indicator was inaccurate; the metric was deemed not valuable or strategic.

Each of our institution-level projects supports one or more of our KPIs (in addition to addressing PFAs)

Objective	Project short name	PFAs					KPIs								
		1	2	3	4	5	Undergrad headcount	Graduate headcount	Resident FTE	Degrees conferred	Retention rate (1st-2nd year)	Graduation rate (6 year)	Net tuition revenue/student	Research expenditures	Employee engagement
Increase enrollment through recruitment and access	Prospective student comms					x	x	x	x				x		
	Admit-to-enroll process	x					x				x				
	Financial access	x					x	x	x	x	x	x	x		
Increase retention and persistence through enhanced student experiences	Campus experience	x			x	x	x	x		x	x	x			
	Student well-being	x					x	x		x	x	x			
	Advising	x	x				x	x		x	x	x			
Shape broadly educated and specifically skilled students for a lifetime of success	Career readiness	x	x		x	x	x	x		x	x	x			
	Interdisciplinary programs	x	x			x	x	x		x				x	
	Civil dialogue	x	x		x	x									
Engage a wider range of learners by expanding educational opportunities to meet learners' varied needs	Non-credit to credit learning	x	x		x		x	x	x	x					
	Cybersecurity hub		x		x	x	x	x	x	x					
	Online learning	x	x				x	x	x	x					
Build partnerships and leverage research and economic development initiatives to address urgent community, state, and global needs	Mental health needs		x		x	x		x							
	Key research areas		x		x	x		x						x	
	Partnering with Tribal communities	x	x		x	x	x	x	x	x	x	x		x	
Attract and support employees through improved recruiting, retention, and management efforts	Recruitment and onboarding			x											x
	Manager development			x											x
	HRS and conflict resolution			x											x
Broaden alumni, community, and donor engagement	UM promotion by external partners				x	x	x	x	x					x	
	Alumni partnerships				x	x	x	x							
	Athletics and Adams Center				x	x			x						
	Philanthropic giving	x	x	x		x	x		x		x				
Strengthen core infrastructure and processes to mitigate risk and improve students' and employees' campus experiences	Data structures	x	x	x			x	x	x	x	x	x	x	x	x
	Banner modernization	x		x			x	x	x	x	x	x	x	x	x
	One digital identity	x		x			x	x	x	x	x	x	x	x	x
TOTAL		15	12	7	11	13	19	18	12	13	11	9	5	7	6

Summary of the national and regional peer institution selection process

Foundational Criteria

Characteristics selected¹ were public, Research 2 (or higher), and 4-year institutions. Urbanization parameters were defined based on a variety of criteria, including the location of historical peers and categories close to Missoula's size. The UAAC Working Group elected to exclude institutions that were private, had medical schools and highest degrees awarded at the baccalaureate level. 2-year colleges were not included in the criteria identified by the working group. IPEDS lists Missoula College as an institution separate from UM. To include 2-year colleges akin to Missoula College would dilute the list significantly. These variables resulted in a list of 99 institutions generated from IPEDS data.

Variables & Statistical Methods

The data consisted of a list of 99 higher education institutions with approximately 40 variables (depending on whether they contained null values) of each one. Some variables had missing values; 35 variables contained no missing values. A random forest model was applied to the data in unsupervised mode to generate a similarity matrix between each pair of institutions. Two versions were run: one with all 40 variables with missing values imputed with median values and one version that only used the 35 variables with no missing values. The institutions were then sorted in order of similarity to UM.

Two lists were generated from the statistical model. One included all 40 variables containing the null values and another list was generated from the model using only the 35 variables containing complete values. The top 20 institutions from both lists (all 40 variables with missing values imputed with median values and the second version that only used the 35 variables with no missing values), excluding the University of Montana, were identified. The University of Montana-Missoula was identified as the top (#1) match in the lists of institutions generated in the statistical output. This test proved the statistical model applied to the variables worked correctly.

Qualitative Selection and Input

Results from the statistical output were reviewed and discussed. Changing the rank of variables was strongly considered, but after lengthy deliberation, the committee determined that making changes to the statistical model risked injecting subjectivity into the output and weighting too heavily on factors/variables that were not supported collectively. The variables used in the statistical model were identified methodically as primary importance by all committee members. Therefore, the model developed should remain pure rather than risk being diluted with outliers not representative of the consensus that the committee had already established.

Finally, a qualitative ranking approach was designed to provide some realignment while preventing a complete overhaul of the statistical model. A survey was designed to gather feedback from each committee member to review all 99 institutions individually and make

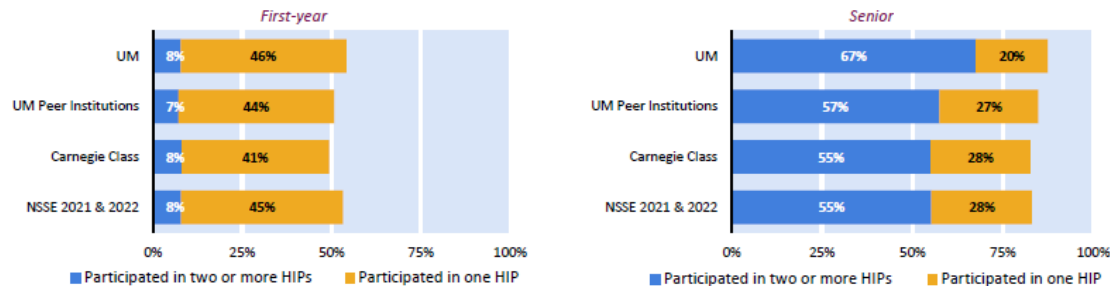
selections and adjustments independent of the top 20 institutions generated in the statistical output. Respondents were required to provide justification for selecting any institution that ranked lower in similarity to the University of Montana than the top 20 (those ranked in the output with a score between 21-99). Results were tallied and reverse-coded.

The set of national and regional peer institutions selected. Institutions followed by an asterisk also figure on [the list of UM's peers determined by OCHE](#).

- Idaho State University*
- Indiana State University
- New Mexico State University Main Campus*
- North Dakota State University Main Campus
- South Dakota State University
- University of Alabama in Huntsville
- University of Alaska Fairbanks*
- University of Arkansas at Little Rock
- University of Maine
- University of Northern Colorado*
- University of Southern Mississippi
- University of Wyoming*
- Wichita State University

2022 NSSE High-Impact Practices results (excerpts)**NSSE 2022 High-Impact Practices****Participation Comparisons****University of Montana****Overall HIP Participation**

The figures below display the percentage of students who participated in High-Impact Practices. Both figures include participation in service-learning, a learning community, and research with faculty. The senior figure also includes participation in an internship or field experience, study abroad, and culminating senior experience. The first segment in each bar shows the percentage who participated in at least two HIPs, and the full bar (both colors) represents the percentage who participated in at least one.

**Statistical Comparisons**

The table below displays the percentage of your students who participated in a given High-Impact Practice, including the percentage who participated in at least one or in two or more HIPs. It also graphs the difference, in percentage points, between your students and those of your comparison groups. Blue bars indicate how much higher your institution's percentage is compared to the comparison group. Dark red bars indicate how much lower your institution's percentage is compared to the comparison group. (Comparison group percentages appear on the following pages.)

Your students' participation compared with:

	UM	UM Peer Institutions		Carnegie Class		NSSE 2021 & 2022	
	%	Difference ^a	ES ^b	Difference ^a	ES ^b	Difference ^a	ES ^b
First-year							
Service-Learning	52	+7	* .13	+10	** .19	+4	.08
Learning Community	7	-2	-.08	-4	* -.14	-2	-.08
Research with Faculty	2	-2	-.10	-2	-.13	-2	-.12
Participated in at least one	54	+3	.07	+5	.10	+1	.02
Participated in two or more	8	+1	.02	-0	-.01	-0	.00
Senior							
Service-Learning	65	+7	** .15	+11	*** .23	+6	* .12
Learning Community	25	+2	.05	+4	.09	+4	* .09
Research with Faculty	30	+12	*** .29	+8	*** .17	+9	*** .22
Internship or Field Exp.	57	+7	** .13	+11	*** .22	+13	*** .25
Study Abroad	8	+2	* .09	-2	-.08	+0	.00
Culminating Senior Exp.	48	+3	.06	+8	** .15	+5	* .10
Participated in at least one	87	+3	.08	+5	** .14	+4	* .12
Participated in two or more	67	+10	*** .21	+12	*** .26	+12	*** .25

a. Percentage point differences (institution – comp. group) rounded to whole numbers. Values less than one may not display a bar and may be shown as +0 or -0.

b. Cohen's *h* (standardized difference between two proportions). Effect sizes indicate the practical importance of observed differences. For service-learning, internships, study abroad, and culminating senior experiences, an ES of about .2 may be considered small, .5 medium, and .8 large. For learning community and research with faculty, an ES of about .1 may be considered small, .3 medium, and .5 large (Rocconi & Gonyea, 2018).

p* < .05, *p* < .01, ****p* < .001 (z-test comparing participation rates).

Note: Participation includes the percentage of students who responded "Done or in progress" except for service-learning which is the percentage who responded that at least "Some" courses included a community-based project. All results weighted by institution-reported sex and enrollment status (and by institution size for comparison groups).



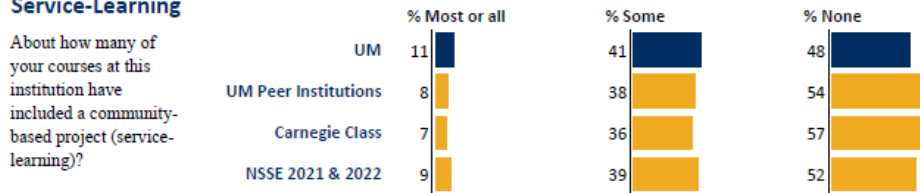
NSSE 2022 High-Impact Practices

Response Detail

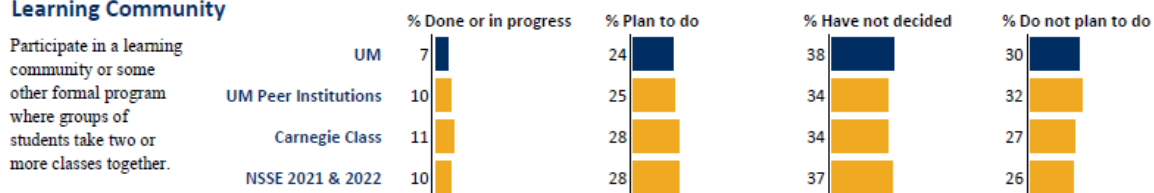
University of Montana

First-year students

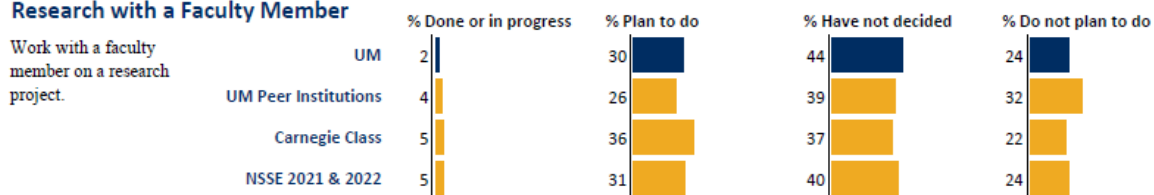
Service-Learning



Learning Community



Research with a Faculty Member





NSSE 2022 High-Impact Practices

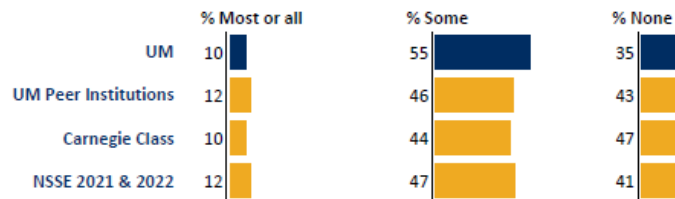
Response Detail

University of Montana

Seniors

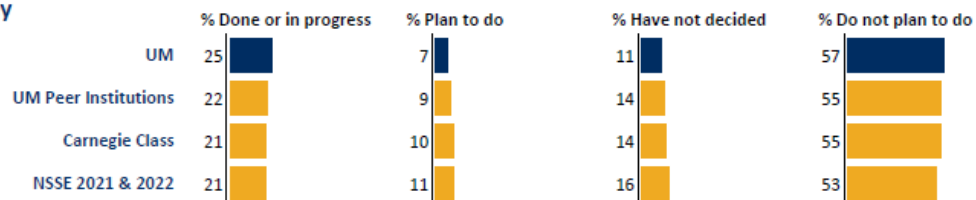
Service-Learning

About how many of your courses at this institution have included a community-based project (service-learning)?



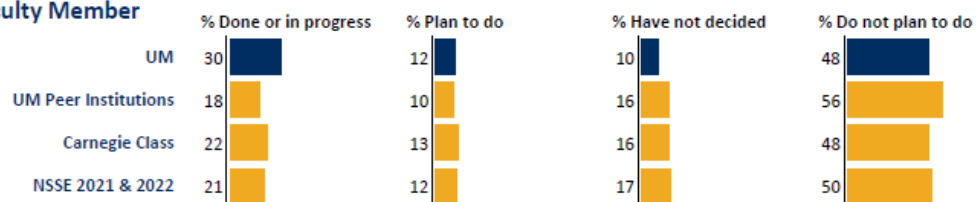
Learning Community

Participate in a learning community or some other formal program where groups of students take two or more classes together.



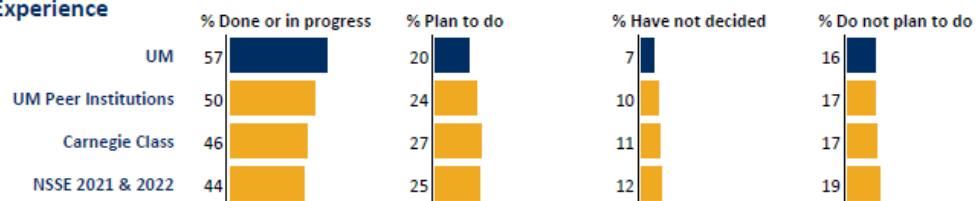
Research with a Faculty Member

Work with a faculty member on a research project.



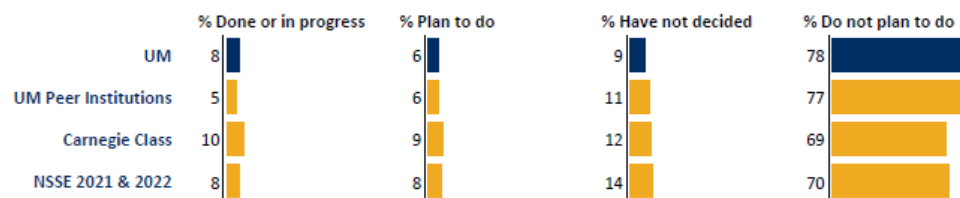
Internship or Field Experience

Participate in an internship, co-op, field experience, student teaching, or clinical placement.



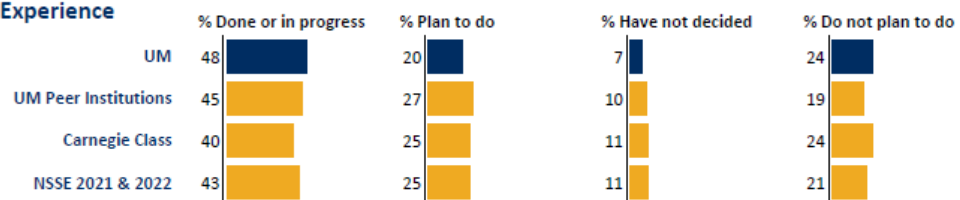
Study Abroad

Participate in a study abroad program.



Culminating Senior Experience

Complete a culminating senior experience (capstone course, senior project or thesis, portfolio, recital, comprehensive exam, etc.).



Note: Results weighted by institution-reported sex and enrollment status (and institutional size for comparison groups).

Full report available upon request.

UM shared governance roles and responsibilities

- UM's Faculty Senate is established as the core of academic governance in the faculty collective bargaining agreements (CBAs). Faculty Senate is the conduit for faculty participation in UM shared governance. Faculty Senate reviews, debates, and votes on issues pertaining to the academic welfare of the institution in consultation and cooperation with President Bodnar, Provost Lawrence, and the UM administration.
- Per its mission statement, the UM Staff Senate facilitates communication and cooperation between the administration and the classified staff of UM. Staff Senate also advocates for staff professional welfare.
- The Associated Students of the University of Montana (ASUM) is the student government at UM. ASUM is the representative voice for UM students, including those within the Graduate and Professional Student Association (GPSA).
- University administrators participate in the shared governance and institutional decision making of the University. Executive leaders serve as Executive Sponsors for projects outlined in the University's Annual Playbook and in support of institutional objectives, and administrators at all levels are encouraged to share their ideas and perspectives with the vice presidents in sector-level planning exercises.

UM administration communication and interactions with shared governance.

- Faculty, staff, and students play significant roles in the University shared governance by participating in their respective senates and serving as senate representatives on numerous committees.
- The UM administration regularly seeks input from faculty, staff, and student senates on institutional decision-making. Senate representatives attend monthly University Leadership Council meetings which include Executive Leadership Team members and Academic Officers. Each senate sets the agenda for one Cabinet meeting per month, allowing for attention on issues impacting their constituents. Additionally, the leaders of each shared governance group meet with President Bodnar monthly, and Faculty Senate leaders meet with Provost Lawrence regularly.
- To set the stage for a healthy shared governance culture, the Office of the President and Office of the Provost facilitate an annual shared governance retreat with the leaders of each shared governance group at the start of each academic year. At this retreat, shared governance leaders gather with President Bodnar and Provost Lawrence, along with other administrators, to outline their hopes and concerns for the year and to collectively commit to a co-defined set of principles for collaboration.

Participants and units included in SOR activities, FY 24

Annual Playbook Input	# FY24 Participants Involved	# FY24 Units Represented	Notes
College-level Strategic Outlooks	14 deans	12 colleges	Number of participants does not include those with whom the deans consulted.
Unit-level Strategic Outlooks	42-unit leaders	42 separate units	Number of participants does not include those with whom unit leaders consulted.
Previous FY Annual Playbook	37 project leaders	30 units	Number of participants does not include project teams the project leaders have gathered to support implementation, nor does the number include executive sponsors. Each institutional project outlined in the Playbook is assigned a Project Lead and Executive Sponsor. The Project Lead engages staff and faculty in designing an Implementation Plan, ensuring the plan is shaped by campus expertise. Each Implementation Plan also includes a stakeholder analysis and commitments to engaging those impacted by and interested in the project.
DEI plan	24 accountable owners 50+ supporters	50+	It is difficult to quantify number of supporters as some represent bodies such as the Faculty Senate or the Diversity Advisory Council.

			It is similarly difficult to quantify the scope of units involved as DEI plan efforts are deeply embedded across sectors and into units.
Flagship Fund	30+ proposal participants 15 funded proposals 14 advisory group members		
University Leadership Council	46	35	

Summary of challenges and opportunities FY 24

Challenges	Opportunities
Financial sustainability – higher education business model • Reduced public support • Cost / affordability / student financial support / student debt • Reduced confidence in ROI of college education • Shrinking traditional-age demographics • New, more innovative entrants into higher ed • More innovative and aggressive traditional competitors • Resistance to change Learning and outcomes expectations • Students expect engaging technology-enhanced experiences • Desire for more flexible credentialing options • Quality of instruction Talent management	Advanced education and skills have never been more important • Emerging careers emphasize technical and people/organizational leadership skills • People need to continue to learn and retool throughout their lives Growing awareness and demand for addressing social justice issues / diversity, equity, inclusion Adapt and expand programs, teaching and learning to meet student and employer needs • More applied, interdisciplinary learning and research opportunities • Excel at building foundational skills: creativity, information processing, problem solving, communication

• Attracting, developing, and retaining faculty and staff • Funding appropriate levels of staffing Adequate core capabilities and support systems • Technology enabled processes and services • Data / decision support • Communication Others • Legal and policy compliance • Data security • Business continuity • Physical infrastructure • Cost of living in Missoula • Mental health of students and employees	• Unbundle programs and curriculum and repackage learning to meet a greater variety of need. More shorter-term options and credentials. Develop new learner markets • Mid-career learners • Work-based programs Quality of life in Western Montana – beauty, recreation, culture • Provide exceptional residential experience • Improve campus leadership culture and skills
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Sample course syllabi

Sample 1 of 2

University of Montana

[ScholarWorks at University of Montana](#)

[University of Montana Course Syllabi, 2021-2025](#) Spring 2-1-2022

LIT 110L.05: Introduction to Literature

Jessica Marabeth Dougherty-McMichael

University of Montana, Missoula, Jessica.Dougherty@umontana.edu

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LIT 110L 01C – INTRODUCTION TO LITERATURE – CRN 31663

INSTRUCTOR: Jessica Dougherty-McMichael EMAIL: Jessica.Dougherty@mso.umt.edu

TR 2:00-3:20 MC 235

Office: MC 404 Office Hours: Monday 12:00-2:00, Thursday 11:00-12:00 & by appointment (f2f & Zoom).

Link for Zoom Office Hours

<https://umontana.zoom.us/j/97632622255?pwd=aDZ3cVJR3dUVWdpMG94Wk9pRnJlZz09>

COURSE DESCRIPTION

When we think of literature, we think of a broad range of writing from poetry to drama, novels to biography. Literature is art, escapism, truth, rhetoric, fiction, non-fiction, political, personal and much more. It is a phenomenon that shapes culture and our understanding of the world. In this course, we will explore literature and develop ways in which we can critically discuss it by not just reading literature but actively engaging with it. We will discuss literary themes, terms and concepts, challenging both our own and conventional understandings of literature.

COURSE OBJECTIVES AND GOALS

As a literature course and in keeping with the general education requirements, this course is designed to develop your skills in the following areas:

- analyze works of art with respect to structure and significance within literary and artistic traditions, including emergent movements and forms
- develop coherent arguments that critique these works from a variety of approaches, such as historical, aesthetic, cultural, psychological, political, and philosophical.

We will read a wide range of literature through a variety of relevant critical lenses, including historical, cultural, political, social and aesthetic perspectives. You will be asked to develop coherent critiques of literature both in class and in your written work. As this course also fulfills the Writing Course requirement a significant amount of time will be focused on the writing process and the use of writing in developing critical evaluations of literature. We will focus on developing the following areas:

- Use writing to learn and synthesize new concepts

- Formulate and express opinions and ideas in writing
- Compose written documents that are appropriate for a given audience or purpose
- Revise written work based on constructive feedback
- Find, evaluate, and use information effectively
- Begin to use discipline-specific writing conventions
- Demonstrate appropriate English language usage

INFORMATION LITERACY

As we explore literature we will engage in a semester-long discussion of information production. We will consider how to find and utilize information effectively and ethically and we will analyze how information is made – what rhetorical, political, and social forces influence the construction of information. We will also consider the construction of information specific to the discussion of literary works.

You will be required to conduct library research for your final paper. While doing such research, we will consider how information is constructed and how rhetorical, political and social forces influence the construction of information.

REQUIRED TEXTS

The Norton Introduction to Literature Shorter 13th ed. Editor: Kelly J. Mays ISBN: 978-0393938920

All other readings will be available on Moodle.

COVID-19 SAFETY PROCEDURES

The University of Montana is requiring mask usage in all classrooms and laboratories regardless of vaccine status. New cases of COVID-19, predominately caused by the Omicron variant of coronavirus, are increasing in Missoula County and across Montana. The University of Montana in following the Missoula City-County Health Department guidance recommends all individuals (regardless of vaccine status) also wear a mask indoors and get vaccinated to help slow the spread of COVID-19. Because the conditions, rules, guidance, and recommendations surrounding the COVID-19 pandemic continue to evolve rapidly, these guidelines are subject to change. You are encouraged to stay up-to-date with the most current COVID-19 guidance using the resources listed at the end of these guidelines.

- Mask use is required within the classroom or laboratory.

- If you feel sick and/or are exhibiting COVID-19 symptoms, please don't come to class and contact the Curry Health Center at (406) 243-4330.
- If you are required to isolate or quarantine, you will be supported, and it is the hope to ensure continued academic progress.
- UM recommends students get the COVID vaccine and booster. Please direct your questions or concerns about vaccines to the Curry Health Center.
- Drinking liquids and eating food is discouraged within the classroom.

REQUIRED TECHNOLOGY: CAMPUS E-MAIL ACCOUNT, MICROSOFT WORD, MOODLE, ZOOM

Please activate your campus e-mail account right away. Every student is issued a university e- mail account, and there is no cost.

This course requires essential computer skills so that you can access email and negotiate Moodle and Zoom. **Early in the semester, UM offers a number of Moodle workshops. If you are unfamiliar with Moodle, Zoom, or if you have limited computer experience, please attend these workshops. You can also find information at [Keep on Learning](#).** You will be expected to work with computers for appropriate class assignments, and most correspondences will be conducted via email/Moodle. Most class materials and instructions will be posted in Moodle.

With the exception of some initial explanations during our first classes, please do not expect extra time in class for any learning curve you might face with technology. Likewise, please do not expect any extensions on due dates for an assignment because of any technical difficulties you have not conquered. Backup all work.

Papers will be submitted in Microsoft Word. If you do not currently have Microsoft Word, be sure to access your free UM version. Directions can be found [here](#).

USB DRIVE AND/OR ONLINE STORAGE

You will be working with multiple drafts throughout the semester and will need to save each draft. While it is important to save these drafts to your personal computer/laptop/tablet it is not always possible to access these drafts, therefore you will need either a USB storage device (flash drive, jump drive, USB drive, thumb drive, memory stick) and/or online storage (while most online storage services are sufficient, the university offers [UM box](#) for free).

UNIVERSITY-WIDE PROGRAM-LEVEL WRITING ASSESSMENT

This course requires an electronic submission (via Moodle) of an assignment stripped of your personal information to be used for educational research and assessment of the university's writing program. Your paper will be stored in a database. A random selection of papers will be assessed by a group of faculty and staff using a rubric developed from the following Writing Learning Outcomes.

- Compose written documents that are appropriate for a given audience or purpose
- Formulate and express opinions and ideas in writing
- Use writing to learn and synthesize new concepts
- Revise written work based on constructive feedback
- Find, evaluate, and use information effectively
- Begin to use discipline-specific writing conventions (largely style conventions like APA or MLA)
- Demonstrate appropriate English language usage

This assessment in no way affects either your course grade or your progression at the university. Here's the [rubric](#) that will be used to score the papers.

GRADING AND COURSEWORK

CLASS PARTICIPATION: Central to any literature course is classroom discussion. Our own readings are informed and enhanced through critical and thoughtful discussion with others. As such, **participation and attendance** cannot be stressed enough.

- You are allowed **two** absences. Further absences will result in a 5 point **deduction** from your grade per absence.
- You are allowed **four** Zoom classes. This option is to be used if you cannot attend the f2f class but are able to attend via zoom. It is intended for days when you may have to isolate due to COVID concerns, if you are feeling unwell due to the flu, cold, or other seasonal ailment but are still able to participate in class, if you have to care for someone who is unwell, if you have to travel for a family emergency/event, etc. **For Zoom access email me at least three hours before the class begins and I will send you a zoom link.**
- If you have any extenuating circumstances such as significant illness or emergency that will affect your attendance or will require additional zoom classes, please inform me and arrangements can be made.

Frequent late arrivals and early departures will count against the participation grade as will the use of any messaging device during class. Participation also includes bringing the relevant text(s) to class and being prepared for discussions, workshops, etc.

The participation grade includes writing conferences, workshops, as well as general participation during class and small group discussions. **15% of grade**

INFORMAL/READER RESPONSE: There are **3** short informal response papers (**1-2 pages**) on an assigned topic. While these papers will be graded either pass or fail, they are expected to be typed and follow the standard paper format. **15% of grade (5% each)**

CONTEXT RESPONSE: There are **3** short context papers (**1-2 pages**) that ask you to look at the historical/cultural/critical context and respond to the connections. Each paper will be required active engagement of all relevant texts. **15% (5% each)**

ANALYTIC ARGUMENT/LITERARY ANALYSIS: There are **2** short analytic arguments due during the semester. These papers will focus on a close reading of a text from the course and address questions and issues highlighted in the course. Each paper will be **3-4 pages** in length. You are **required to revise** the first paper and are encouraged to revise the second paper by the end of the semester. **30% of grade (15% each)**

RESEARCH PAPER: The final paper is an analytic argument focused on a text (or texts) and the wider context: **4-6 pages** in length. The paper requires a minimum of **2** outside sources. **20% of grade**

ANNOTATED BIBLIOGRAPHY: Annotated Bibliography for your Research paper. **5% of grade**

PAPER AND FILE FORMAT

Submitting assignments will be done electronically via Moodle. All assignments must use appropriate MLA format including, Times New Roman 12 pt font, standard double space, and one inch margins. Electronic files will be uploaded to the appropriate Moodle Assignment drop. The file must be in a doc or docx format and titled using the following format: lastnameassignmentname.docx (for example, DoughertyMcMichaelFormall.doc).

Documents submitted that do not use the proper format will not be graded and the assignment will receive a zero.

ACADEMIC INTEGRITY

The most clear and concise definition of plagiarism I have found comes from Neil Baird. I quote it at length below:

“Plagiarism is defined as representing another person’s words, ideas, data, or work as one’s own. Plagiarism includes, but is not limited to, the exact duplication of another’s work and the incorporation of a substantial or essential portion thereof. Other examples of plagiarism include the acts of appropriating the artistic or musical composition of another and Internet documents, or portions thereof, presenting them as your own.

The key to avoiding plagiarism is to give proper credit whenever the following are used:

- Another person's ideas, opinions, or theories
- Facts, statistics, graphs or other drawings or any pieces of information that are not common knowledge
- Quotations of another's actual spoken or written words
- Paraphrases of another's spoken or written words
- Organization patterns or structures of another's spoken or written work

Worth noting is the fact that ignorance does not excuse plagiarism. Intentional plagiarism consists of knowingly copying or using another's work without giving proper credit. Unintentional plagiarism, on the other hand, may result from a lack of familiarity with citation standards, poor research methods, or careless "cutting and pasting" of Internet and other electronic sources. In either case, both intentional and unintentional plagiarism constitute violations of the policy on Academic Dishonesty. Please see me if you have *any* questions or concerns, for plagiarism results in a failing grade on a particular paper to failure of the course." (Baird, Course Syllabus)

Plagiarism of any sort will result in a course grade of F. Please look over the University/College's [Student Code of Conduct](#). The Mansfield Library's "Plagiarism and Academic Honesty" page is also quite useful.

STUDENT DECORUM

Missoula College is designed as a space to share ideas and learn from one another. It is not a space for disrespectful behavior including antagonistic or bigoted language, consistent late arrivals to class, or disruptive behavior in class, including the use of cell phones. We will discuss issues that may result in disagreement and dialogue, but that dialogue should be conducted in a professional and respectful manner, one that respects the dignity of all participants.

DIVERSITY, EQUITY, AND INCLUSIVITY

Missoula College values the diversity of its students, faculty, and staff as an essential strength that contributes to our shared educational mission. Students of all backgrounds and perspectives are recognized and respected in this class. Course content and activities are intended to honor diversity of gender, sexuality, ethnicity, race, culture, religion, age, disability, socioeconomic status, and all dimensions of diverse human experiences and their intersection. Please notify your instructor if components of this course present barriers to your inclusion. Students can also reach out to Dr. Salena Beaumont Hill in the [Office of Inclusive Excellence for Student Success](#), which provides student support for BIPOC and LGBTQ+ students and student groups. To explore making a formal report about discrimination or harassment, please visit the [Equal Opportunity / Title IX office](#). For counseling or advocacy related to discrimination, please visit [SARC](#).

ACADEMIC SUPPORT SERVICES

We believe that all students can succeed if they put their minds to it. The Learning Center offers a variety of services to help students reach this goal. Learning Center staff tutor in many subject areas, provide academic counseling, and assist students in the transition to college. The best news is that all of these services are free and available to all students. For more information, please call 406.243.7826. The Learning Center is located in MC 022.

The Mansfield Library and the Writing and Public Speaking Center are also both excellent resources for researchers and writers.

OFFICE FOR DISABILITY EQUITY (ODE)

In keeping with University policy please remember –

The University of Montana assures equal access to instruction through collaboration between students with disabilities, instructors, and the Office for Disability Equity (ODE). If you think you may have a disability adversely affecting your academic performance, and you have not already registered with ODE, please contact ODE in Lommasson 154. I will work with you and ODE to provide an appropriate accommodation.

Students with disabilities may request reasonable modifications by contacting me. The University of Montana assures equal access to instruction through collaboration between students with disabilities, instructors, and the Office for Disability Equity

(ODE). “Reasonable” means the University permits no fundamental alterations of academic standards or retroactive modifications. For more information, please consult [ODE](#).

BEAR NECESSITIES AND UM FOOD PANTRY AND GRIZZLY CUPBOARDS

Students who are experiencing basic needs insecurity are encouraged to contact ASUM Bear Necessities through their [webpage](#) or phone, 243-2017, or stop by UC 118. For students experiencing food insecurity, contact the UM Food Pantry at umpantry@mso.umt.edu for support. The UM Food Pantry is located in the ASUM offices in the southwest corner on first floor of the University Center. In addition to the UM Food Pantry, Grizzly Cupboards can currently be found on the Missoula College Campus in room 430, Trio Student Support Services in Lommasson Center room 180, and at AISS in suite 113 of the Payne Family Native American Center. You can follow the Food Pantry on Instagram at [um_pantry](#), like them on Facebook, and follow the blog at umpantry.substack.com.

CURRY HEALTH CENTER COUNSELING

Curry Health Center Counseling addresses the personal, behavioral, and mental health needs of UM students. They have licensed counselors and psychologists, as well as advanced graduate students. Individual appointments are \$25.00 and your initial consultation is free if you have paid the health fee for the semester. (If you have not paid the fee, you can pay at any time in the semester to access Curry.) You can call them at

243-4711, and you can visit their website: <http://www.umt.edu/curry-health-center/Counseling/default.php>.

STUDENT ADVOCACY RESOURCE CENTER (SARC)

SARC provides **free** and **confidential** support and brief counseling services for students who have experienced gender-based discrimination (e.g. sexual violence, sexual harassment, rape, sexual assault, domestic violence, and/or stalking). In the confidential setting, students will be made aware of available resources and reporting options. An advocate is available for all students upon request through SARC. SARC is located in Curry Health Center, Room 108, their number is **243-4429**, and their website is <http://www.umt.edu/student-advocacy-resource-center/>. Students are also welcome to call their 24-hour support line (406) 243-6559.

TITLE IX

Title IX protects people from discrimination based on sex in education programs or activities that receive Federal financial assistance. Title IX states that:

No person in the United States shall, on the basis of sex, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any education program or activity receiving Federal financial assistance.

In accordance with Title IX laws, all employees at The University of Montana are considered “Responsible Employees,” which requires me to report incidents of gender-based discrimination (e.g. sexual violence, sexual harassment, rape, sexual assault, domestic violence, and/or stalking) to the Title IX Coordinator, Alicia Arant (243-5710, eoaa@umontana.edu, University Hall, Room 006). Please know, I will work with you when I do this. Once an incident is reported to Title IX, the student will be contacted by the Title IX Coordinator for follow up. Students can also report directly to the Title IX coordinator in regards to any gender-based discrimination.

Due to the nature of this course assigned readings may change throughout the semester to better cater to the needs of the class. Be sure to pay attention in class and check email/Moodle for modifications.

WEEK ONE

1/18 Introductions

1/20 “Introduction” 1-13

“On First Looking into Chapman’s Homer” 4

WEEK “My Father’s ‘Norton Introduction to Literature,’ Th

TWO ird Edition (1981)”

10-11

1/25 “Fiction: Reading, Responding, Writing” 16-47

“Cathedral” 28-38

“Narration and Point of View” 169-173

“Plot” 75-83

1/27 “Cathedral” 28-38

Review:

“Basic Moves: Paraphrase, Summary, Description” 1914-1917

“The Writing Process” 1938-1950

“Quotation, Citation, and Documentation” 1962-1992

WEEK THREE

2/1 “Character” 218-225

“Setting” 282-288

“Symbol and Figurative Language” 380-385

“The Thing in the Forest” 397-412

2/3 “Symbol and Figurative Language” 380-385

“The Thing in the Forest” 397-412

Informal Paper 1 Due WEEK FOUR

“Literary Analysis” Moodle

Historical Context paper due

WEEK FIVE

2/15 “Theme” 429-733

“Sonny’s Blues” 91-114

2/17 “Theme” 429-733

“Sonny’s Blues” 91-114

WEEK SIX

2/22 “Critical Contexts” 607-642

“The Things They Carried” 609-622

2/24 “Critical Contexts” 607-642

“The Things They Carried” 609-622

Short Formal Paper 1 due

WEEK SEVEN Writing Conferences

3/1	“Poetry: Reading, Responding, Writing”	730-754	
	“Speaker: Whose Voice Do We Hear?”	769-777	
	“We Real Cool”	779-780	
3/3	“Situation and Setting: What Happens? Where? When?”		795-811
	“Theme and Tone”	830-836	
	“Morning Song”	1154-1155	

WEEK EIGHT

3/8	“Language: Word Choice and Order”	854-860	
	“Visual Imagery and Figures of Speech”	866-878	
	“Symbol”	884-890	
	“Digging”	1144-1145	
	“Facing It”	1149-1151	
	“Barbie Doll”	1151-1152	
	“Kind of Blue”	868	
3/10	“Language: Word Choice and Order”	854-860	
	“Visual Imagery and Figures of Speech”	866-878	
	“Symbol”	884-890	
	“Digging”	1144-1145	
	“Facing It”	1149-1151	
	“Barbie Doll”	1151-1152	
	“Kind of Blue”	868	

Informal II Due

WEEK NINE

3/15	“The Sounds of Poetry”	899-909	
	“Dulce et Decorum Est”	913	
3/17	“The Sounds of Poetry”	899-909	
	“Dulce et Decorum Est”	913	

Revised Formal I Due

Spring Break

WEEK TEN

3/29 “Internal Structure” 930-939
“External Form” 951-955
959-961
“Do Not Go Gentle into that Good Night” “Bilingual Sestina”
“I/a” 955

Moodle 959

3/31 “Internal Structure” 930-939
“External Form” 951-955
959-961
“Do Not Go Gentle into that Good Night” “Bilingual Sestina”
“I/a” 955

Moodle 959

Critical Context Paper Due WEEK ELEVEN

4/14 “The Harlem Renaissance” 1065-1070
1078-1096
“The Black Finger” 1072
“Tenebris” 1073
“The Weary Blues” 1073-1074
“Sonnet to a Negro in Harlem” 1076
“If We Must Die” 1077
“America” 1077-1078

Short Formal II Due WEEK THIRTEEN

WEEK FOURTEEN

4/26 The Importance of Being Earnest 1798-1842

Context Paper Due

4/28 The Importance of Being Earnest 1798-1842

WEEK FIFTEEN

5/3 The Importance of Being Earnest 1798-1842

Informal III Due

5/5 The Importance of Being Earnest 1798-1842

Annotated Bibliography Due

WEEK SIXTEEN – FINALS WEEK

5/11 Wednesday 1:10-3:10

Final Paper and Optional Revisions Due

Sample 2 of 2

University of Montana

[ScholarWorks at University of Montana](#)

[University of Montana Course Syllabi, 2021-2025](#) Fall 9-1-2022

NRSM 326.01: Climate and Society

Laurie A. Yung

University of Montana, Missoula, laurie.yung@umontana.edu

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NRSM 326 Climate and Society Fall 2022, MWF 1-1:50 pm, LA 011

Instructor: Laurie Yung laurie.yung@umontana.edu

Office hours: By appointment (please email to schedule – I am always happy to meet)

Course Description

This course examines the relationship between climate and society, with a focus on interactions across scales and different dimensions of society. The course draws on a range of social science disciplines to explain social vulnerability, the politics of climate change, communication and behavior change, adaptation and land management, and systems and transformations. The goal of the course is to advance student understanding of climate change as a complex problem and the ways in which social science insights can contribute to solutions. Students learn to use social theory and social science research to develop social vulnerability assessments, climate communication campaigns, community energy transition plans, and public planning processes for climate resilience.

Course Objectives

Students in this course will:

1. Understand the core social and political components of climate change, and how to use that knowledge to advance effective communication, mitigation, adaptation, and transformation.
2. Learn how to apply key insights from social science to the problem of climate change and to integrate these insights into communications, planning, and decision-making.
3. Improve writing, speaking, and analytical skills. More specifically, students will:
 - a) Apply complex systems thinking to climate change and climate solutions.
 - b) Examine the concept of social vulnerability and the process of social vulnerability assessment to understand the uneven impacts of climate change.
 - c) Understand the social, political, and psychological processes that explain why climate change is politically polarized.
 - d) Use findings from communication science and behavioral science to develop climate communications campaigns.
 - e) Learn strategies to build resilience in different sectors and communities and develop processes to engage the public in resilience planning.
 - f) Explore adaptation options for land managers and agricultural producers.
 - g) Analyze proposed energy transitions and societal transformations, across local to global scales, and develop plans for community-scale energy transitions.

As an advanced writing course, students will:

- Identify and pursue more sophisticated questions for academic inquiry
- Find, evaluate, analyze, and synthesize information effectively from diverse sources
- Manage multiple perspectives as appropriate
- Recognize the purposes and needs of discipline-specific audiences and adopt the academic voice necessary for the chosen discipline
- Use multiple drafts, revision, and editing in conducting inquiry and preparing written work
- Follow the conventions of citation, documentation, and formal presentation appropriate to that discipline
- Develop competence in information technology and digital literacy

Flipped Classroom Structure

Some portions of this course are structured as a flipped classroom. Many of the course materials (e.g. readings, recorded lectures, other videos) are provided via Moodle and the expectation is that students will complete this material prior to class meetings. This

enables us to utilize most of our classroom time for more active learning, where we can practice applying concepts, hone analytic skills, and engage in deliberation. It is very important that students understand that course material and reflections must be completed prior to class meetings.

Course Readings and Videos

Required Course textbook: Leichenko, R. and K. O'Brien. (2019) *Climate and Society: Transforming the Future*. Polity Press. Cambridge, U.K.

Additional course readings, recorded lectures, and videos will be available on Moodle/UMOnline.

Please be prepared to pay approximately \$10 to rent films.

As noted above, readings and videos must be completed prior to class meetings. To adequately prepare for class, students need to read/watch this material, taking notes to prepare for class. Students should be familiar with the “facts” outlined in the readings and videos (who, what, when, where, how, etc.) and carefully analyze and critique the material presented. As you are reading and watching, make notes related to any discussion question(s) that have been provided, as well as key points, questions you have, interesting issues raised, and connections to other topics being covered in the course.

Course Schedule

Week 1 (8.29-9.2) Models of Climate and Society Week 2 (9.6-9.9) Social Impacts and Vulnerability Week 3 (9.12-9.16) Social Vulnerability Assessment Week 4 (9.19-9.23) Public Views of Climate Change

9.23 Social Vulnerability Assessment Paper Due by Midnight (submit via Moodle)

Week 5 (9.26-9.30) The Politics of Climate Change

9.30 1-1:50 pm Exam #1 via Moodle (exam covers content from weeks 1-5)

Week 6 (10.3-10.9) The Science of Climate Communications Week 7 (10.10-10.14) Mitigation and Human Behavior

10.12 and 10.14 No Class – Online Learning Days

Week 8 (10.17-10.21) Individual Versus/And System Change

10.21 Climate Communications Campaign DRAFT Due by Midnight (submit via Moodle)

Week 9 (10.24-10.28) The Social Side of Energy Week 10 (10.31-11.4) Community Energy Transitions

11.4 1-1:50 pm Exam #2 via Moodle (exam covers content from weeks 6-10)

Week 11 (11.7-11.10) Prehistoric Adaptation

Week 12 (11.14-11.18) Tribal and Community Resilience

11.18 Climate Communications Campaign REVISION Due by Midnight (submit via Moodle)

Week 13 (11.21) Community Resilience, Cont. – *No Class - Online Learning Day*

Week 14 (11.28-12.2) Adaptation and Resilience on Public Lands

Week 15 (12.5-12.9) Adaptation, Agriculture, and Food Systems Transformation 12.12 1:10-3:10 pm Exam #3 (exam covers content from weeks 11-15)

12.15 Planning Process Paper Due by Midnight (submit via Moodle)

Assignments and Evaluation

Assignment	Percent of Grade	Due Date
Attendance/Participation/In-Class Presentations	10%	Ongoing
Reflections on Moodle	10%	Ongoing
Exam #1	10%	9/30/22
Exam #2	10%	11/4/22
Exam #3	10%	12/12/22

Assignment	Percent of Grade	Due Date
Social Vulnerability Assessment	15%	9/23/22
Climate Communications Campaign DRAFT <i>Not graded but lose points if fail to submit</i>		10/21/22
Climate Communications Feedback Provided by Instructors		11/4/22
Climate Communications Campaign REVISION	20%	11/18/22
Planning Process Paper	15%	12/15/22

All assignments should be submitted via Moodle.

Important Note: Instructors will make every effort to ensure the accuracy of the Moodle gradebook. However, please note that Moodle gradebooks have limitations and student grades may not always be accurate.

Papers

There are three major written assignments for this course. In the first paper (2-3 page double spaced), students will design a social vulnerability assessment, including identifying metrics for measuring social vulnerability for a specific decision. In the

second paper (4-5 pages double spaced), students will design a climate communications campaign with a specific goal and audience in mind. Students will submit a draft of their second paper for feedback and then submit a revision that integrates that feedback. In the third paper (3-4 pages double spaced), students will design a climate adaptation or resilience planning process for public lands or a community. In each of these papers, students will utilize social theory and social science research to develop a tool that could be used for real-world problem solving. Detailed guidelines for these assignments will be posted on Moodle.

Exams

There will be three exams (none are cumulative). Instructors will make every effort possible to post study guide questions each week to help students prepare for the exam. Exam questions will be almost entirely pulled from the large bank of study guide questions. Exams will be taken remotely via Moodle on 9/30 (1-1:50), 11/4 (1-1:50), and 12/11 (1:10-3:10). Students must take the exams at those dates and times (except in cases of a family or medical emergency, or other extenuating circumstances). Students can take the exams at a location of their choosing (e.g. apartment, dorm room, computer lab).

Reflections and Responses

Throughout the course, students will be required to respond to some of the readings, lectures, and videos by providing short reflections on Moodle. When reflections are required, there will be a question following a specific reading, lecture, or video and a target length will be provided (e.g. 3-5 sentences). Please note that reflections must be completed by 10:00 am on the date they are due (or points will be deducted).

Participation and Attendance

PLEASE READ THIS CAREFULLY! Participation grades will be based on attendance, punctuality, coming to class prepared, active engagement during class discussions and debates, and group presentations. Attendance will be taken at every class. Students with unexcused absences will have the opportunity to make up the material through substantial, time-consuming additional assignments. More than three unexcused absences with no make-up assignments completed will result in a zero in participation (and thus a 10% reduction in the student's final grade).

More than six unexcused absences will automatically result in an F in the course, with no options to do make-up assignments.

HOWEVER, in cases where students have family or medical emergencies, or other legitimate reasons for missing class, I am always willing to make alternative arrangements and accommodations, on a case-by-case basis. Please communicate with me if something is interfering with your attendance so we can troubleshoot! I am very happy to work with students who are experiencing difficult circumstances.

COVID! If you need to miss class due to any of the following, I will work with you to make up the content in a timely manner so you can continue to make progress in the course: (1) you test positive for COVID and need to isolate, (2) you have COVID symptoms and you are being responsible and staying home until you get your test results, or (3) your kids test positive or need to quarantine, and you need to stay home to take care of them. I will work with students in any of these situations on appropriate make-up assignments.

Grading Scale

Final course grades will be determined based on the following scale:

93-100 A

90-92 A-

88-89 B+

83-87 B

80-82 B-

78-79 C+

73-77 C

70-72 C-

68-69 D+

63-67 D

60-62 D-

59- F

Course Policies

Attendance Policy

Please see Participation and Attendance above for details about course attendance policy.

Late Assignments

Points will be deducted for late reflections, presentations, and papers (the later you turn them in, the more points you will lose), but please note that better late than never definitely applies (i.e. it's better to get some credit for an assignment rather than none at all). If you have a family or medical emergency, or another legitimate reason to submit assignments late, please talk with me as soon as possible. Please reach out if you are finding it difficult to keep up! I will take your circumstances into account and we can make alternative arrangements, but please know that I may ask for documentation.

Equal Access to Instruction and Office of Disability Equity

The University of Montana assures equal access to instruction through collaboration between students with disabilities, instructors, and the Office for Disability Equity (ODE). If you anticipate or experience barriers based on disability, please contact the ODE at: (406) 243-2243, ode@umontana.edu, or visit www.umt.edu/disability for more information. Retroactive accommodation requests will not be honored, so please, do not delay. As your instructor, I will work with you and the ODE to implement an effective accommodation, and you are welcome to contact me privately if you wish.

Cultural Leave Policy

Cultural or ceremonial leave allows excused absences for cultural, religious, and ceremonial purposes to meet the student's customs and traditions or to participate in related activities. To receive an authorized absence for a cultural, religious or ceremonial event the student or their advisor (proxy) must submit a formal written request to the instructor. This must include a brief description (with inclusive dates) of the cultural event or ceremony and the importance of the student's attendance or participation. Authorization for the absence is subject to approval by the instructor. Appeals may be made to the Chair, Dean, or Provost. The excused absence or leave may not exceed five academic calendar days (not including weekends or holidays).

Students remain responsible for completion or make-up of assignments as defined in the syllabus, at the discretion of the instructor.

Academic Honesty and Plagiarism

All students must practice academic honesty. Academic misconduct is subject to an academic penalty by the course instructor and/or a disciplinary sanction by the University. All students need to be familiar with the [Student Conduct Code](#). Please be aware that plagiarism is a violation of the student conduct code and will not be tolerated in this course. If a student plagiarizes, their course grade will be impacted and the UM Dean of Students will be notified. If you aren't entirely certain what constitutes plagiarism is, please see these excellent resources:

[Plagiarism Web Link](#) [Writing Center Link](#)

[Owl English Purdue Link](#)

[Owl English Purdue Resource Link](#)

Grading Option

Please note that this class is offered for traditional letter grade only; it is not offered under the credit/no credit option.

Deadlines and Resources

Important Dates Restricting Opportunities to Drop a Course Fall 2021

Please see these two webpages for information on drop deadlines and the process for dropping a course: <https://www.umt.edu/registrar/calendar/> and <https://www.umt.edu/registrar/calendar/autumn.php>

Career Readiness

The Franke College of Forestry and Conservation is committed to the career success of our students and encourages you to participate in [ElevateU](#) – UM's signature career readiness program – to ensure that you graduate career-ready, with the education, skills, and tools needed to launch, carry-on, and pivot your post-graduation career. Participation in ElevateU is free and can be started at any time, no matter where you are in your academic or career journey. Get started by creating a profile on [Handshake](#) to search for jobs and internships or by [scheduling an appointment](#) with an [Experiential Learning and Career Success \(ELCS\)](#) career coach or advisor.

Food and Housing Insecurity

Any student who faces challenges securing food or housing, and believes that this could affect their performance in this course, is urged to contact any or all of the following campuses resources:

Food Pantry Program

UM offers a food pantry that students can access for emergency food. The pantry is open on Tuesdays from 12 to 5 PM and Fridays from 10 AM to 5 PM. The pantry is located in UC 119 (in the former ASUM Childcare offices). Pantry staff operate several satellite food cupboards on campus (including one at Missoula College). For more information about this program, email umpantry@mso.umt.edu, visit the [UM Food Pantry website](#) or contact the pantry on social media (@pantryUm on twitter, @UMPantry on Facebook, um_pantry on Instagram).

ASUM Renter Center

The Renter Center has compiled a [list of resources](https://medium.com/griz-renter-blog) (<https://medium.com/griz-renter-blog>) for UM students at risk of homelessness or food insecurity. Students can schedule an appointment with Renter Center staff to discuss their situation and receive information, support, and referrals.

TRiO Student Support Services

TRiO serves UM students who are low-income, first-generation college students or have documented disabilities. TRiO services include a textbook loan program, scholarships and financial aid help, academic advising, coaching, and tutoring.

Students can [check their eligibility](http://www.umt.edu/trioss/apply.php) (www.umt.edu/trioss/apply.php) for TRiO services online. If you are comfortable, please come see members of the teaching team. We will do our best to help connect you with additional resources.

Assessment training



November 9, 2022 - 2-3 p.m. - Zoom

Agenda

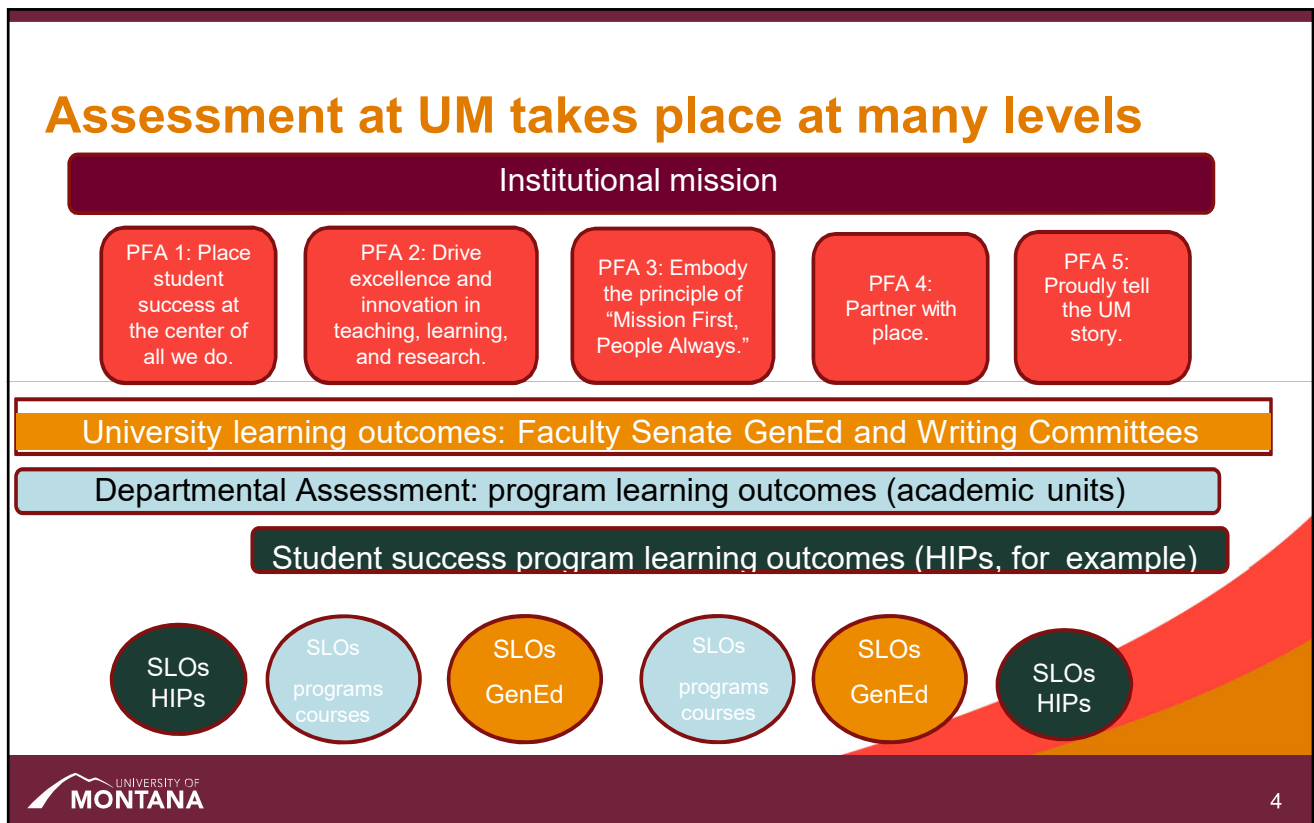
Welcome and introductions

Why participants are here – specific questions, concerns

Assessment background and context; definitions

Walk through Departmental Assessment Report form

- Mission statement
- Department alignment with Priorities for Action (PFAs)
- Student Learning Outcomes and measurement tools
- Results and Modifications
- Future Plans
- Curriculum Maps and other appendices



Assessment basics

- Assessment is always a work in progress, not a finished product.
- It is an opportunity to reflect on what matters to us as educators and practitioners.
- Curiosity – Are students learning what we want them to? How can we better help them learn?
- Goal – To foster a community of active, reflective practitioners.
- Purpose – Informed decision making. Set goals, gather information, take action.

Departmental assessment report deadlines and support

Deadlines

- First deadline – December 15, 2022
- Final deadline – January 13, 2023

Office hours to help departments meet final deadline

- Monday, January 9, 11 a.m.-noon (zoom)
- Wednesday, January 11, 3-4 p.m. (zoom)

Departmental assessment report template overview

Mission statement

- Simple update (if applicable)

Departmental alignment with the Priorities for Action

- If your program or student learning outcomes connect to the themes of the Priorities for Action (PFA), list them here
- Add any departmental initiatives that relate to the Priorities for Action (PFAs)
 - PFA 1: Place student success at the center of all we do.
 - PFA 2: Drive excellence and innovation in teaching, learning, and research.
 - PFA 3: Embody the principle of “Mission First, People Always”.
 - PFA 4: Partner with place.
 - PFA 5: Proudly tell the UM story.



2/26/2024

7

Departmental assessment report template overview

Student learning outcomes (SLOs) and measurement tools

- How your unit currently is conducting assessment, based on past reports and feedback from the Assessment Advisory Committee

Results, modifications, future plans

- What you're learning and whether there's anything you plan to change/improve
 - “If an assessment hasn't yielded useful information, stop doing it and do something else.” - Linda Suskie

Appendices and curriculum maps

- Opportunities to demonstrate that you and your colleagues think about student learning, discuss your curriculum and determine where various learning outcomes are met.



8

What happens after departmental assessment reports are submitted?

Assessment Advisory Committee review – spring semester 2023

- Teams of two reviewers apply [scoring sheet](#) to report
- Discuss and draft feedback
- Provide feedback to departments
- Post to web and provide as evidence of commitment to improving student learning to accreditation evaluation team (site visit to take place spring 2024)

Office of the Provost support on applying feedback – summer-fall 2023

- Academic units that need support applying feedback can request it
- Workshop/group sessions or individual discussions

*Questions or
comments?*

Thank you!

University of Montana Evaluation of Institutional Effectiveness Self-Evaluation Report –
Appendix

Assessment report template

Department/School/Program Name

YEAR Assessment Report

MISSION STATEMENT

Insert Department Mission Statement

DEPARTMENT ALIGNMENT WITH PRIORITIES FOR ACTION

After listing each departmental objective, indicate which of the five Priorities for Action the objective supports. In this section, you may also briefly describe any innovative or noteworthy programs/initiatives that support the Priorities for Action.

STUDENT LEARNING OUTCOMES and MEASUREMENT TOOLS

Student Learning Outcomes	<Measurement Tool>	<Measurement Tool>	<Measurement Tool>	<Measurement Tool>
1. <Insert student learning outcomes>				
2.				
3.				

RESULTS and MODIFICATIONS

Student Learning Outcomes results	Modifications made to enhance learning
Insert Learning Outcome results, particularly the high scores or low scores for the goal discovered from assessment data	Insert any curricular, pedagogical, or assessment modifications made to enhance learning
Insert Learning Outcome results, particularly the high scores or low scores for the goal discovered from assessment data	Insert any curricular, pedagogical, or assessment modifications made to enhance learning

FUTURE PLANS FOR CONTINUED ASSESSMENT

Summarize future plans for continued assessment

APPENDICES

List any attached appendices, such as a curriculum map or full data report from a measurement

University of Montana Evaluation of Institutional Effectiveness Self-Evaluation Report –
Appendix

Curriculum map template

UM Curriculum Map Template						
Degree						
Required Course (Name and Number)	Outcome 1:	Outcome 2:	Outcome 3:	Outcome 4:	Outcome 5:	Outcome 6:
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
KEY:						
I = Introduced						
D = Developed/reinforced, with opportunities to practice						
M = Mastery						
A = Assessment evidence collected						

Assessment report scoring tool

**Departmental/Program Assessment Scoring
Sheet AY22-23**

Department/Program:

Date Reviewed:

Q1 Mission Statement	Detailed & clear	More detail needed	Unable to assess
Is the mission statement specific to the department?			
Is it clear and well-articulated?			

Comments (100 words or less)

Q2 Department/program objectives and alignment with Priorities for Action	Detailed & clear	More detail needed	Unable to assess
Do the objectives align with the mission of the department and UM's Priorities for Action?			
Does the department describe any innovative or noteworthy programs/initiatives that support these strategic initiatives?			

Comments (100 words or less):

Q3a Student Learning Goals	Detailed & clear	More detail needed	Unable to assess
Has the department outlined the knowledge, skills and attitudes they want their students to possess (i.e., the learning outcomes), and not just programmatic/student success outcomes (e.g., passing a test, graduating, getting jobs)?			
Are the student learning outcomes measurable?			

Comments (100 words or less):

Q3b Measurement Tools	Detailed & clear	More detail needed	Unable to assess

University of Montana Evaluation of Institutional Effectiveness Self-Evaluation Report –
Appendix

Has the department gone beyond student grades or pass rates on a test?			
Did the department use direct assessments of students' learning (e.g., specific questions or sub-sections of a test, a rubric, or evaluation form)?			
Did the department use any indirect assessments (i.e., self-reported data)?			
Did the department outline their achievement targets (what is the desirable level of performance for students, and what percentage of students do they expect to achieve this)?			

Comments (100 words or less):

Q4a Results	Detailed & clear	More detail needed	Unable to assess
Did the department provide a summary of some of the key findings from their assessments, perhaps focusing on high and low scores (using concrete numbers or percentages)?			
Has the department provided some analysis and interpretation of these findings, describing why they are significant, surprising, disconcerting, or encouraging?			

Comments (100 words or less):

Q4b Modifications	Detailed & clear	More detail needed	Unable to assess
Has the department outlined ways in which the curriculum, student learning goals, programmatic direction, instructional strategies/delivery can be improved, based upon the findings?			
Did the department describe how the results (challenges as well as successes) could be shared with faculty, students, or other stakeholders?			
Is there enough specificity in the modifications/action plans, indicating who will carry them out, when they will occur, etc.?			

Comments (100 words or less):

University of Montana Evaluation of Institutional Effectiveness Self-Evaluation Report –
Appendix

Q5. Future Plans for Continued Assessment	Detailed & clear	More detail needed	Unable to assess
Has the department outlined clear plans for continued assessment?			
Have they identified ways in which the assessment(s) can be changed or improved (e.g., refining the rubric, measuring different outcomes that were not measured this year, adding additional measurements)?			

Comments (100 words or less):

Q6. Curriculum Map	Detailed & clear	More detail needed	Unable to assess
Has the department outlined a clear curriculum map, in which the student learning goals are appropriately introduced, developed, mastered, and assessed, without major issues?			

Comments (100 words or less):

Q7. Response to suggestions in prior review (if available)	Detailed & clear	More detail needed	Unable to assess
Did the department update or respond to suggestions made in the previous assessment report review?			

Comments (100 words or less):

Overall Comments:

The Assessment Advisory Committee recognizes that the COVID pandemic disrupted regular departmental activities such as program assessment since the last reporting period. Members of the committee took this into account when reviewing and scoring assessment reports. The Assessment Advisory Committee offers the following comments in the spirit of constructive, collegial feedback.

Email to chairs/directors, cc deans explaining program assessment process

Dear Professor X,

Please find attached the [Assessment Advisory Committee \(AAC\)'s](#) feedback on the 2022 assessment report(s) the Department of X submitted. The purpose of these reports is to document assessment of student learning and outcomes across campus; the purpose of the AAC feedback is to ensure your efforts are clearly documented.

The AAC members worked in teams of two to review reports. The committee held norming sessions before and during reviews to ensure consistent application of the report scoring rubric that serves as the basis for feedback.

The process entailed:

- Review of AAC feedback from the 2020 assessment cycle (if available);
- Application of an updated scoring template by the primary reviewer in each team;
- Review and comparison of primary reviewer's work by secondary reviewer;
- Discussion among team members and agreement on final version of feedback to share; and
- My review of the feedback to share.

The AAC recommends that you review this feedback with your faculty before the end of the spring semester, and make plans to continue assessment work in the fall. We thank you for documenting your continued attention and efforts to assess and reflect on student learning!

I am available to answer any questions you may have, share resources, and/or meet with you for continued conversation. If you find areas of feedback do not provide information you need, please let me know so the committee can refine and improve the process.

Best wishes,

AAC Chair

University of Montana Evaluation of Institutional Effectiveness Self-Evaluation Report –
Appendix

Excerpt of chart showing overlap between program learning outcomes, general education learning outcomes and career readiness competencies

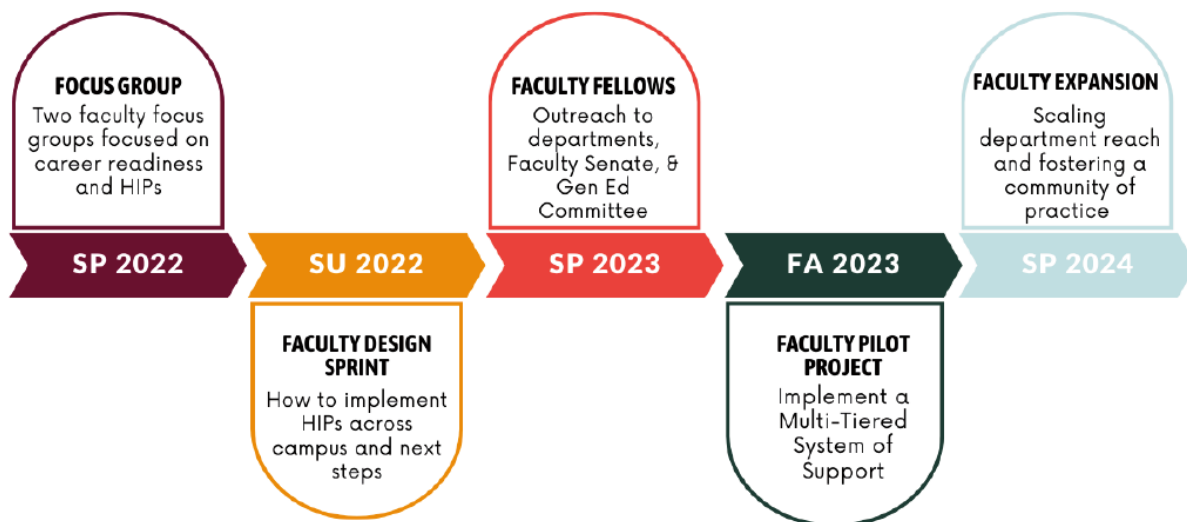
Overlap in learning outcomes estimated from program assessment reports, compared to general education learning outcomes and ELCS career readiness competencies. Draft overview completed August 2023.											
General education learning outcomes (from the UM general education preamble)				ELCS Career Readiness Competencies				Concepts identified in this review (GE denotes general education learning outcome. CRC indicates ELCS career readiness competency.)			
In accordance with the mission of the University of Montana-Missoula, these objectives are to develop competent and humane individuals who are informed, ethical, literate, and engaged citizens of local and global communities. Students should become acquainted with issues facing contemporary society, participate in the creative arts, develop an understanding of science and technology, cultivate an appreciation of the humanities, and examine the history of different American and global cultures. Upon completion of the general education requirements students should be able to articulate ideas orally and in writing, understand and critically evaluate tangible and abstract concepts, and employ mathematical and other related skills appropriate to a technologically focused society.				Career and self-development Communication Critical thinking Equity and inclusion Leadership Professionalism Teamwork Technology Community and global engagement Creativity and innovation				Critical thinking and problem solving (GE and CRC) Communication - written (GE and CRC) Communication - oral (GE and CRC) Information literacy (GE and CRC) Cultural humility (GE and CRC) High-impact practice (e.g., X90 courses) (CRC) Self-awareness/Self-assessment (GE and CRC) Teamwork experience (CRC) Creative work/innovation/research (GE and CRC) Technology work (GE and CRC) Ethics (in the field) (GE and CRC)			
Program	Critical Thinking & Problem Solving	Communication Written	Communication Oral	Information Literacy	Cultural Humility	High-Impact Practice (e.g., X90 courses)	Self-Awareness / Self-Assessment	Teamwork Experience	Creative Work / Innovation / Research	Technology Use	Ethics (in the field)
Business Technology	X	X	X	X		X			X	X	
Chemistry & Biochemistry	X	X		X		X			X		
Climate Change Studies	X	X	X	X	X	X	X		X		X
Communication Studies	X	X	X	X	X		X		X		
Computer Science	X	X	X		X	X		X	X		X
Counseling - MA/EdS/ PhD/ EdD	X	X	X	X	X	X	X		X		X
Davidson Honors College	X	X	X	X	X	X	X	X	X	X	X
Economics	X	X	X	X							
Educational Leadership	X	X	X	X					X		X
English (BA/BFA Creative Writing)	X	X		X	X	X			X		
Environmental Science and Sustainability BS	X	X	X					X	X		
Environmental Studies	X	X	X	X	X	X		X	X		X
Forest Conservation Sciences (PhD)	X	X	X	X	X	X			X		
Forest Management (BS)	X	X	X	X	X	X			X		
Forest Management (MS)	X	X	X	X					X		
Geosciences BS (UG)	X	X	X		X			X			X
Geosciences MS PhD (G)	X	X	X	X	X			X	X		X
Health Professions (AAS degrees) medical assisting, paramedic, xray tech, resp tech, surg tech	X	X	X		X	X		X		X	X

Full chart available upon request.

ELCS faculty engagement overview

AN OVERVIEW OF ACTIVITIES TO DATE

FACULTY COLLABORATION



Career-readiness degree integration pilot project



CAREER-READINESS DEGREE INTEGRATION PILOT PROJECT

Goal 1: Universal, Targeted, and Intensive Support. To provide resources, information, consultation, and training that builds the capacity of faculty and staff, departments, and ELCS in implementing high-impact practices and the infusion of career readiness into the curriculum, leading to meaningful connections between students' academic experience and post-graduation career success.

Tier 3 Objectives

ELCS provides multiple means of intensive support to department or faculty teams that commit to an accountable process to improve the infusion of career readiness in curriculum.

Tier 3 Activities

- Department Consultation
- Syllabi Review
- Course Mapping
- Catered Workshops & Presentations

*Ready
to Go
Deeper*

**TIER 3:
INTENSIVE SUPPORT**

Tier 2 Objective

ELCS provides multiple means of targeted TA responsive to diverse stakeholder groups' needs, requests, and preferences.

Tier 2 Activities

- Skillify Your Syllabi Workshop
- ELCS Resources for Faculty Workshop
- Staff Meeting Participation/ Presentations

*Curious
for More*

TIER 2: TARGETED SUPPORT

Tier 1 Objective

ELCS provides multiple strategies and formats responsive to the needs and preferences of diverse stakeholder groups to share resources and disseminate info. on career readiness, high-impact practices, and curriculum infusion.

Tier 1 Activities

- Faculty Starter Guide
- Website Resources
- Other Print Materials

*Readily
Available
for All*

TIER 1: UNIVERSAL SUPPORT

Motion to include career readiness competencies in general education course learning outcomes

MOTION TO INCORPORATE CAREER READINESS WITHIN GENERAL EDUCATION

General education instructors will self-select 1-3 career-readiness competencies that align with their individual courses. These competencies will appear on the course syllabus alongside the approved general education learning outcomes and be searchable by attribute in the course catalog. For general education course approval and review, instructors will include a reflection on how they incorporated these competencies in their course, the effectiveness in achieving the desired outcomes, and how they might make changes moving forward. The general education committee will provide instructional resources for faculty on the senate website, and the UM Office for Experiential Learning and Career Success will provide additional training and support. A list of Career-Readiness Competencies (listed below) will be added to the general education preamble in the course catalog.

Note: The General Education committee is preparing a concurrent motion to simplify and improve the current assessment practices.

BACKGROUND

The [National Association of Colleges & Employers](#) (NACE) and UM identified 10 career-readiness competencies that employers find desirable in the contemporary workforce. Most of these competencies are already addressed in our current general education areas, but they are not all explicitly named.

1) CAREER & SELF DEVELOPMENT

Proactively develop oneself and one's career through continual personal and professional learning, awareness of one's strengths and weaknesses, navigation of career opportunities, and networking to build relationships within and without one's organization.

2) COMMUNICATION

Clearly and effectively exchange information, ideas, facts, and perspectives with persons inside and outside of an organization.

3) CRITICAL THINKING

Identify and respond to needs based upon an understanding of situational context and logical analysis of relevant information.

4) EQUITY & INCLUSION

Demonstrate the awareness, attitude, knowledge, and skills required to equitably engage and include people from different local and global cultures. Engage in anti-racist practices that actively challenge the systems, structures, and policies of racism.

5) LEADERSHIP

Recognize and capitalize on personal and team strengths to achieve organizational goals.

6) PROFESSIONALISM

Knowing work environments differ greatly, understand and demonstrate effective work habits, and act in the interest of the larger community and workplace.

7) TEAMWORK

Build and maintain collaborative relationships to work effectively toward common goals, while appreciating diverse viewpoints and shared responsibilities.

8) TECHNOLOGY

Understand and leverage technologies ethically to enhance efficiencies, complete tasks, and accomplish goals.

9) COMMUNITY & GLOBAL ENGAGEMENT

Participate in meaningful and beneficial ways with local and global communities as a culturally competent, engaged citizen of the world.

10) CREATIVITY & INNOVATION

Identify goals or common problems, empathize within context, imagine and test novel solutions to adaptively convert what you have into what you envision.

For the research behind the selection of these competencies, NACE prepared the following report:

<https://www.naceweb.org/uploadedFiles/files/2022/resources/2022-nace-career-readiness-development-and-validation.pdf>

Sample Catalog/Syllabus Language

Group VI: Historical Studies

The primary purpose of courses in this perspective is to explore the historical contexts and narratives of human behavior, ideas, institutions, and societies through an analysis of their patterns of development or differentiation in the past. These courses are wide-ranging in chronological, geographical, or topical focus. They introduce students to methods of inquiry that enable them to understand and evaluate the causes and significance of events, texts, or artifacts.

Learning Outcomes:

Critically analyze and evaluate primary sources – such as texts, pictorial evidence, oral histories, music, and artifacts- within their respective historical contexts.

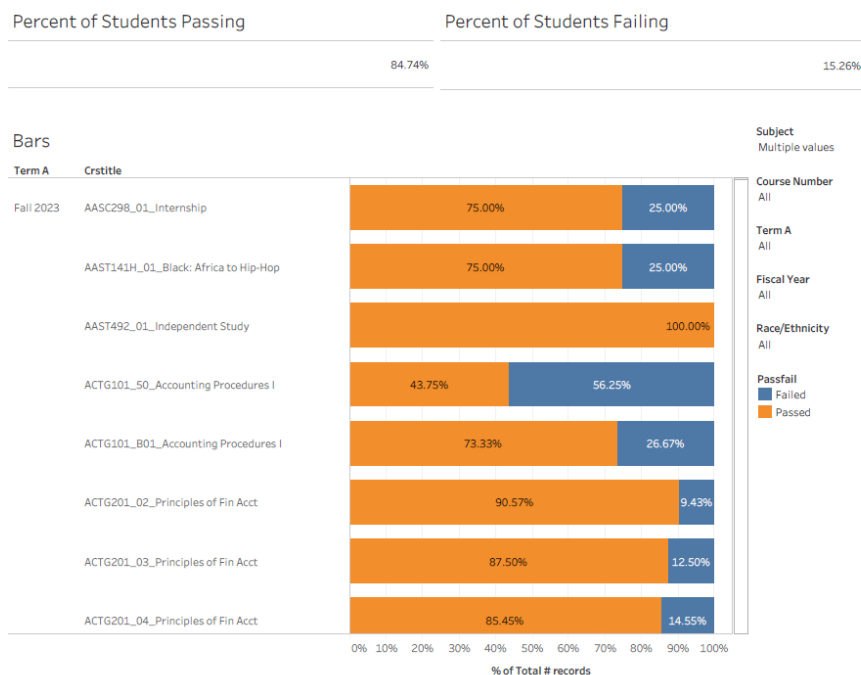
1. Synthesize ideas and information in order to understand the problems, causes, and consequences of historical developments and events.
2. Career-Readiness Skills: Critical Thinking: Identify and respond to needs based upon an understanding of situational context and logical analysis of relevant situational context and logical analysis of relevant information.

University of Montana Evaluation of Institutional Effectiveness Self-Evaluation Report – Appendix

Rationale

1. Including career-readiness competencies alongside our learning outcomes, where appropriate, provides added value for our students, who will be better able to translate relevant experiences in the classroom into job-related skillsets they can promote on a CV or resume.
2. Many UM students earn 30-40 credits in general education, which comprises 25-30% of their coursework, mostly at the 100- and 200-level. The sooner students think about career-readiness and see these competencies emphasized and reiterated in their foundational coursework, the better prepared they will be to leverage these experiences in applications for internships, practicums, and other professional opportunities.
3. Including these competencies in our learning outcomes underscores the practical benefits of general education. Rather than a checked box on DegreeWorks, it explicitly connects student coursework to career readiness. It may also show how these courses surface competencies that are not emphasized in their major.
4. The proposal aligns well with UM's Priorities for Action (PFAs).

DFW dashboard



Peer comparison analysis on 6-year graduation rates

Equity Gaps in Student Achievement: A Study of 6-Year Graduation Rates for Student Groups - University of Montana compared to Regional and National Peers

Introduction

This study was prepared by the Office of Institutional Research (IR) for the University Assessment and Accreditation Committee (UAAC). It compares the 6-year graduation rate of UM students, disaggregated by gender and ethnicity, to that of regional and national peers identified by the UAAC. The source of information for this comparison is Integrated Postsecondary Education Data System (IPEDS) data for academic years 2018-19, 2019-20, and 2020-21. The purpose of this analysis is to improve our understanding of equity gaps in student achievement at UM as compared to our peers.

Of all the metrics UM tracks, the 6-year graduation rate for first-time, full time bachelor's degree seeking students was selected as the broadest indicator of student achievement. The set of peer institutions used in this study is an ad hoc group identified by the University Assessment and Accreditation Committee (UAAC), not the set of peer institutions designated by the Montana Commissioner of Higher Education (OCHE). Note there is some overlap between the two sets. The ad hoc list of peer institutions allows us to better understand the equity gaps for students compared to peer institutions regionally and nationally.

Methodology

For this analysis we focused on gaps in 6-year student achievement across gender, race and ethnicity, and Pell-eligible student populations. We compared those gaps to the average of our peers across 3 years (2018-19, 2019-20, 2020-21; the most recent information published by IPEDS,) and computed % change and 3-year averages.

The chart below reveals UM's current achievement gaps across various student sub-populations, how these gaps compare to peer institutions, and how these gaps have been trending in the last 3 years. Subsequent charts break down this information by specific student groups. The gaps are explained in terms of point difference, so the 9-point difference noted in the first row of the chart below refers to the difference between 2021 6-year graduation rates for male students (43%) and female students (52%) at UM. Information from 2021 is featured below as it's the most recent available.

University of Montana Evaluation of Institutional Effectiveness Self-Evaluation Report –
Appendix

Specific student sub-population	Percent of UM sub-population, 2021	Percent of peers' sub-population, 2021 (average)	Achievement gap for UM in 2021	Achievement gap for peers in 2021	2021 achievement gap: UM compared to peers	UM gap trend	Peer gap trend
Gender (men)	40%	42%	9 points	6 points	Higher	Decreasing	Increasing
2+ races	8%	4%	10 points	10.1 points	Slightly Lower	Increasing	Decreasing
Hispanic	7%	11%	20 points	9 points	Higher	Increasing	Decreasing
American Indian/Alaska Native	4%	2%	28 points	11 points	Higher	Decreasing	Decreasing
Pell-eligible	45%	41%	17 points	8 points	Higher	Increasing	Decreasing

University of Montana Evaluation of Institutional Effectiveness Self-Evaluation Report –
Appendix

Gender analysis

	Women	Men		
UM % of population (Fall 2021 Enrollment IPEDS)	60%	40%		
Peer % of population (Fall 2021 Enrollment IPEDS - Average)	58%	42%		
Year		6-year grad rate - Women	6-year grad rate - Men	Gender Achievement Gap
2018-19	UM	49.0%	39.0%	10.0%
	PEER	52.3%	47.5%	4.8%
2019-20	UM	47.0%	40.0%	7.0%
	PEER	54.2%	46.8%	7.3%
2020-21	UM	52.0%	43.0%	9.0%
	PEER	54.7%	48.7%	6.0%
3-year average	UM	49.3%	40.7%	8.7%
	PEER	53.7%	47.7%	6.1%
3-year average difference between UM and peers		-4.4%	-7.0%	2.6%
% change 2018-2021	UM	6.12%	10.26%	-10.00%
	PEER	4.5%	2.5%	24.1%

The achievement gap across gender for UM was 9% in 2021, compared to 6% for our peers. While UM's gap is greater, the % change shows that our gap has decreased 10% (from 10% to 9%), and our peers' gap has increased 24% (4.8% to 6.0%).

University of Montana Evaluation of Institutional Effectiveness Self-Evaluation Report –
Appendix

2+ Races analysis

	White	2+ Races		
UM % of population (Fall 2021 Enrollment IPEDS)	74%	8%		
Peer % of population (Fall 2021 Enrollment IPEDS - Average)	65%	4%		
Year		6-year grad rate - White	6-year grad rate - 2+ Races	Achievement Gap
2018-19	UM	46.0%	47.0%	-1.0%
	PEER	54.0%	41.0%	13.0%
2019-20	UM	48.0%	32.0%	16.0%
	PEER	54.5%	42.0%	12.5%
2020-21	UM	50.0%	40.0%	10.0%
	PEER	55.7%	45.6%	10.1%
3-year average	UM	48.0%	39.7%	8.3%
	PEER	54.7%	42.9%	11.9%
3-year average difference between UM and peers		-6.7%	-3.2%	-3.5%
% change 2018-2021	UM	8.70%	-14.89%	-1100.00%
	PEER	3.1%	11.2%	-22.4%

Students who identified as being of 2 or more races accounted for 8% of UM’s total population in 2021. The achievement gap across students who identify as 2 or more races for UM was 10.1% in the most recently available year, compared to 10 % for our peers. While the achievement gap for students of two or more races is decreasing, on average, for our peer

University of Montana Evaluation of Institutional Effectiveness Self-Evaluation Report –
Appendix

institutions, at UM it is increasing. In 2018, the 6-year graduation rate for students of two or more races at UM was slightly better than it was for White students. Unfortunately, the gap at UM increased over the three years shown here.

Hispanic analysis

	White	Hispanic		
UM % of population (Fall 2021 Enrollment IPEDS)	74%	7%		
Peer % of population (Fall 2021 Enrollment IPEDS - Average)	65%	11%		
Year		6-year grad rate - White	6-year grad rate - Hispanic	Achievement Gap
2018-19	UM	46.0%	36.0%	10.0%
	PEER	54.0%	39.9%	14.1%
2019-20	UM	48.0%	23.0%	25.0%
	PEER	54.5%	43.7%	10.8%
2020-21	UM	50.0%	30.0%	20.0%
	PEER	55.7%	46.4%	9.3%
3-year average	UM	48.0%	29.7%	18.3%
	PEER	54.7%	43.3%	11.4%
3-year average difference between UM and peers		-6.7%	-13.7%	6.9%
% change 2018-2021	UM	8.70%	-16.67%	100.00%
	PEER	3.1%	16.3%	-34.3%

Students who identified as Hispanic accounted for 7% of UM's student body in 2021. The achievement gap across Hispanic students for UM was 20% in 2021, compared to 9.3% for our

University of Montana Evaluation of Institutional Effectiveness Self-Evaluation Report –
Appendix

peers. Not only is UM's gap greater, but its rate of increase is 18% (from 10% to 20%), compared to a decrease in our peers (14.1% to 9.3%).

American Indian/Alaska Native (AI/AN) analysis

	White	AI/AN		
UM % of population (Fall 2021 Enrollment IPEDS)	74%	4%*		
Peer % of population (Fall 2021 Enrollment IPEDS - Average)	65%	2%		
Year		6-year grad rate - White	6-year grad rate - AI/AN	Achievement Gap
2018-19	UM	46.0%	17.0%	29.0%
	PEER	54.0%	25.2%	28.8%
2019-20	UM	48.0%	13.0%	35.0%
	PEER	54.5%	41.3%	13.2%
2020-21	UM	50.0%	22.0%	28.0%
	PEER	55.7%	45.1%	10.6%
3-year average	UM	48.0%	17.3%	30.7%
	PEER	54.7%	37.2%	17.5%
3-year average difference between UM and peers		-6.7%	-19.9%	13.1%
% change 2018-2021	UM	8.70%	29.41%	-3.45%
	PEER	3.1%	79.0%	-63.3%

Students who identified as AI/AN accounted for 4% of UM's total student body in 2021. The achievement gap across AI/AN students for UM was 28% in the most recently available year,

University of Montana Evaluation of Institutional Effectiveness Self-Evaluation Report –
Appendix

compared to 10.6% for our peers. Both rates are decreasing, but the gap at peer institutions is closing at a faster rate. It is significant here to mention that UM serves a larger proportion of AI/AN students than most of the peer institutions in the comparison group. Per IPEDS reporting criteria for AI/AN ethnicity, 4% of UM's student body is AI/AN, compared to the 2% on average of our peers.

Pell recipient analysis

	Non-Pell Eligible	Pell Eligible		
UM % of population (Fall 2021 Enrollment IPEDS)	55%	45%		
Peer % of population (Fall 2021 Enrollment IPEDS - Average)	59%	41%		
Year		6-year grad rate – Non-Pell Eligible	6-year grad rate - Pell Eligible	Achievement Gap
2018-19	UM	48.5%	32.9%	15.6%
	PEER	54.7%	42.9%	11.8%
2019-20	UM	49.5%	33.3%	16.2%
	PEER	53.1%	42.2%	10.9%
2020-21	UM	50.1%	32.7%	17.4%
	PEER	50.7%	42.5%	8.2%
3-year average	UM	49.4%	33.0%	16.4%
	PEER	52.8%	42.5%	10.3%
3-year average difference between UM and peers		-3.5%	-9.6%	6.1%
% change 2018-2021	UM	3.3%	-0.6%	11.5%
	PEER	-7.3%	-0.9%	-30.5%

University of Montana Evaluation of Institutional Effectiveness Self-Evaluation Report – Appendix

The achievement gap for Pell recipient students at UM was 17.4% in 2021, compared to 8.2% for our peers. Not only is UM's gap greater, but its rate of increase is also 11.5% (from 15.6% to 17.4%), compared to a 30.5% decrease for our peers (11.8% to 8.2%).

Conclusion

In comparison to regional and national peers, UM can improve 6-year graduation rates for students in the categories analyzed above. Of all the barriers causing equity gaps for students, there may be some that apply to all and some that affect specific groups more than others. However, UM's student achievement efforts should continue seeking to benefit multiple student populations.

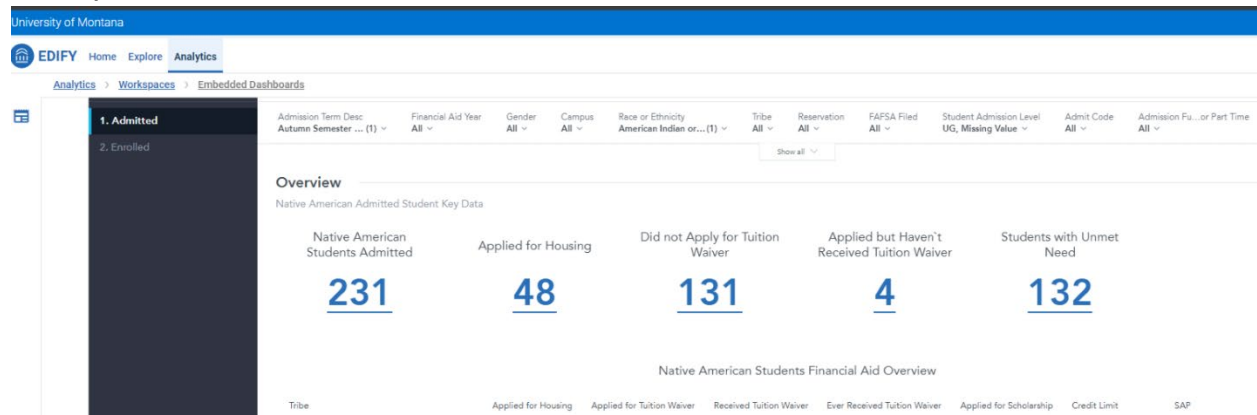
University of Montana Evaluation of Institutional Effectiveness Self-Evaluation Report – Appendix

Financial Barriers identifier report

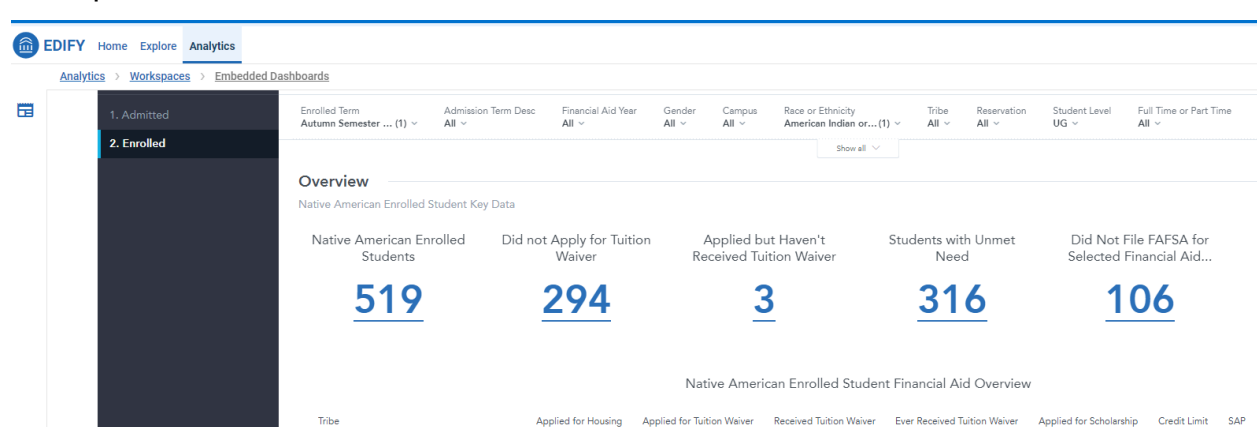
The Financial Barriers Identifier workspace is a tool for practitioners (e.g. financial aid staff, advisors, American Indian Student Services) to learn more about financial barriers that may affect success outcomes (e.g. enrollment, retention, graduation, etc.) for Native American students at the University of Montana. The workspace includes four dashboards, each focused on one of four distinct groups among the Native American population with whom student success practitioners may conduct interventions or work to remove specific barriers:

- Admitted Students (who have not yet enrolled or matriculated)
- Enrolled Students (currently enrolled Native American students)

Example of Financial Barriers Identifier Database for Admitted Students



Example of Financial Barriers Identifier Database for Enrolled Students



University of Montana Evaluation of Institutional Effectiveness Self-Evaluation Report – Appendix

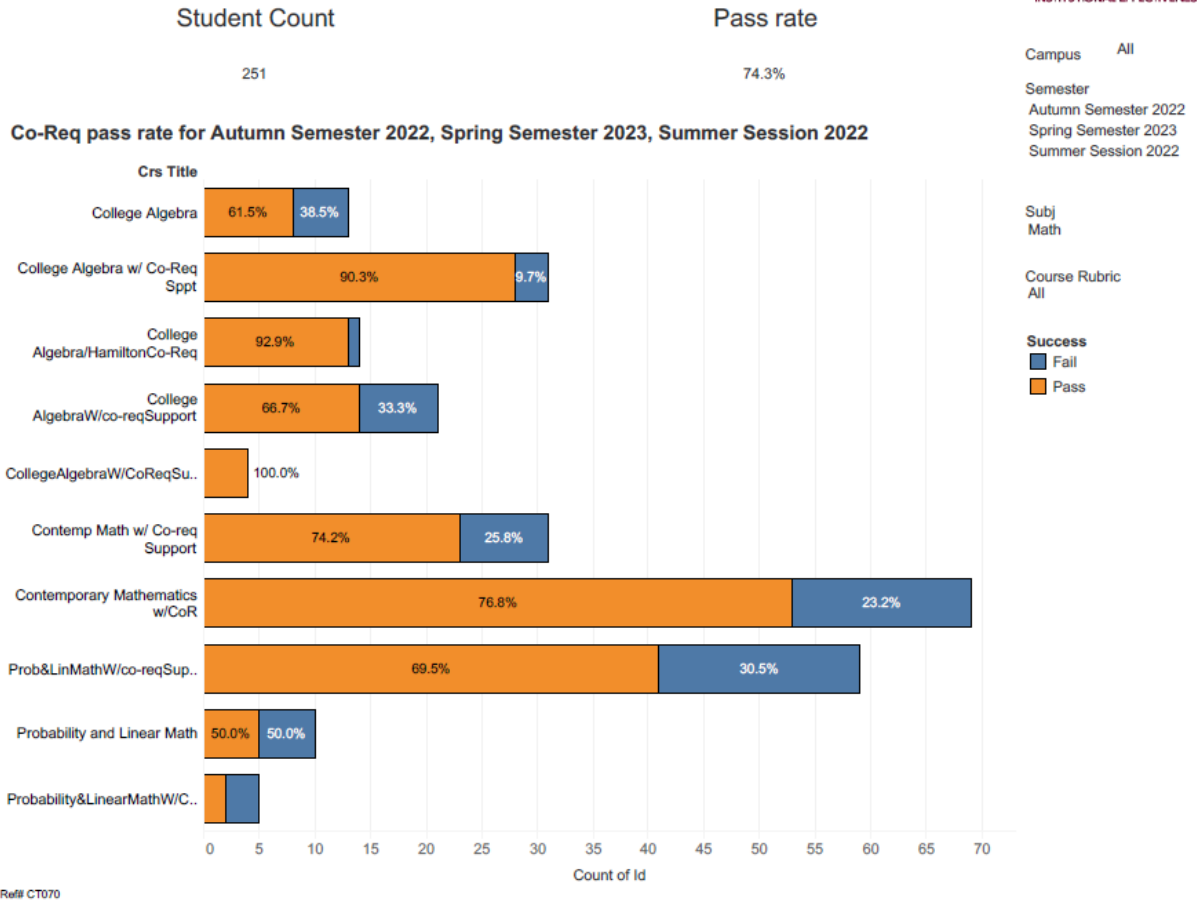
Co-requisite dashboard

Co-requisite course success, math

Corequisite Class Success



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University of Montana Evaluation of Institutional Effectiveness Self-Evaluation Report –
Appendix

Co-requisite course success, writing

Corequisite Class Success

