



FY24

Annual Playbook

June 20, 2023

Our approach

We shape and execute strategy to fulfill our mission, pursue our vision, and serve our students and the state of Montana in the most effective way possible.

Effective strategy is an iterative process. Therefore, each year we review our University's mission and strategic vision, assess the progress we've made over the course of the current academic year, and develop a playbook for the year ahead to move us toward our collective vision.

As part of this process, we:

- *Reflect on and celebrate successes and lessons learned*
- *Examine the external environment to identify new challenges and opportunities*
- *Consider where to invest precious human and financial resources for highest impact*

This year's playbook contains eight long-term objectives that focus on enrollment, student success, curricular adaptation, economic and civic development, amplified impact through engagement, and internal capacity around human resources, data, and technology.

The projects highlighted in this playbook represent cross-sector, urgent opportunities and needs. The Office of Strategic Planning and Implementation (OSPI) provides support as the campus community implements them.

These projects do not represent all of the efforts and resources focused on achieving our institutional objectives. University sectors, individual units, and existing institutional efforts like those outlined in UM's Diversity, Equity, and Inclusion plan, contribute to meeting our objectives. OSPI works with leaders across campus to connect and align those efforts.





Mission

***At the University of Montana our mission is simple.
Our mission is inclusive prosperity.***

To provide a flagship education that's as all-encompassing and awe-inspiring as the Treasure State itself. To be the university that's both accessible and accountable—respected around the world, resourceful in our stewardship of the land that sustains us, and responsive here at home to all of Montana's communities and Indigenous cultures. To be a hub for unbridled curiosity and untamed creativity that's unmatched on either side of the Rockies. So that wherever Grizzlies roam, they thrive, ensuring our world's rarest treasures and greatest resources flourish and prosper, today, tomorrow, and well into the future.

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.



Vision

The University of Montana will be a

Flagship for the Future

***fostering inclusive prosperity and democracy
and creating new knowledge and ways of learning***

Priorities for Action

UM's Priorities for Action serve as values that guide our decisions and actions. Each objective in this year's playbook addresses multiple priorities for action.

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.

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.

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.

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.

5. Proudly tell the UM story

We are an institution whose transformative impact on individual students, Montana, and the world needs to be known.

Objective 1

Increase enrollment through recruitment and access

Projects

Strengthen prospective student communications and engagement

Executive Sponsors: Jenny Petty, Vice President for Marketing & Communications; Mary Kreta, Vice President for Enrollment Management and Strategic Initiatives

Project Leads: Joey Crowley, Data Analytics Manager, Sydney Hovenkotter, Associate Director of Enrollment Management

Refine and implement strategic admit-to-enrollment process

Executive Sponsors: Leslie Webb, Vice Provost for Student Success; Mary Kreta, Vice President for Enrollment Management and Strategic Initiatives

Project Leads: Joey Crowley, Data Analytics Manager; Noah Adams, Operations and Personnel Manager

Remove barriers and expand financial access through financial aid, fundraising, and advocacy

Executive Sponsors: Mary Kreta, Vice President for Enrollment Management and Strategic Initiatives; Adrea Lawrence, Interim Provost and Vice President for Academic Affairs

Project Leads: Leslie Webb, Vice Provost for Student Success; Andrea Janssen, Director, Financial Education

Priorities addressed

PFA 1: STUDENT SUCCESS

PFA 2: ACADEMICS & RESEARCH

PFA 5: TELL THE UM STORY

Objective 2

Increase retention and persistence through enhanced student experiences

Projects

Partner across Campus Life, Academic Units, Grizzly Athletics & Club Sports, and Brand Experience efforts to build a vibrant campus, a sense of belonging, and a uniquely Griz identity.

Executive Sponsors: Leslie Webb, Vice Provost for Student Success; Jenny Petty, Vice President for Marketing & Communications; Kent Haslam, Director, Intercollegiate Athletics

Project Leads: Nic Hallisey, Associate Athletic Director, Marketing and Communications; Karen Schlatter, Brand Experience Manager

Enhance student well-being through a robust community of care to include expansion of the well-being coordinator program, increased access to Curry Health Center services, and faculty outreach focused on student demographics

Executive Sponsor: Leslie Webb, Vice Provost for Student Success

Project Lead: Kayli Julius, Wellness Director; Faculty Senate representative

Improve advising through staffing, technology, and partnership

Executive Sponsors: Leslie Webb, Vice Provost for Student Success; Adrea Lawrence, Interim Provost and Vice President for Academic Affairs

Project Lead: Brian French, Executive Director, Office for Student Success

Priorities addressed

PFA 1: STUDENT SUCCESS

PFA 2: ACADEMICS & RESEARCH

PFA 4: PARTNER WITH PLACE

PFA 5: TELL THE UM STORY

Objective 3

Shape broadly educated and specifically skilled students for a lifetime of success

Projects

Embed career readiness across the curriculum and co-curriculum

Executive Sponsor: Adrea Lawrence, Interim Provost and Vice President for Academic Affairs

Project Lead: Andrea Vernon, Director of Experiential Learning & Student Success

Identify, enhance, and develop successful cross-college collaboration and relevant interdisciplinary programs

Executive Sponsor: Adrea Lawrence, Interim Provost and Vice President for Academic Affairs

Project Lead: John DeBoer, Vice Provost for Academic Affairs

Develop a cross-campus effort to model civil dialogue and promote civic and democratic engagement

Executive Sponsor: Adrea Lawrence, Interim Provost and Vice President for Academic Affairs

Project Lead: Michael Rohd, Director, Co-Lab for Civic Imagination

Priorities addressed

PFA 1: STUDENT SUCCESS

PFA 2: ACADEMICS & RESEARCH

PFA 4: PARTNER WITH PLACE

PFA 5: TELL THE UM STORY

Objective 4

Engage a wider range of learners by expanding educational opportunities to meet learners' varied needs

Projects

Establish and refine institutional processes to remove barriers to learning opportunities for different learner types and to facilitate learner movement between non-credit and for-credit learning

Executive Sponsor: Adrea Lawrence, Interim Provost and Vice President for Academic Affairs

Project Leads: Paul Gladen, Associate Vice President for Research & Economic Development; Shara Tscheulin, Vice Provost for Educational Initiative and Innovation

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

Executive Sponsor: Brad Goan, Senior Advisor for Strategic Innovation

Project Lead: Tom Gallagher, Dean, Missoula College

Identify and implement market-driven online learning opportunities

Executive Sponsor: Adrea Lawrence, Interim Provost and Vice President for Academic Affairs

Project Lead: Shara Tscheulin, Vice Provost for Educational Initiative and Innovation

Priorities addressed

PFA 1: STUDENT SUCCESS

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Objective 5

Build partnerships and leverage research and economic development initiatives to address urgent community, state, and global needs

Projects

Collaborate with partners to address health needs across Montana, with a particular focus on mental health

Executive Sponsor: Brad Goan, Senior Advisor for Strategic Innovation

Project Leads: Ashby Kinch, Dean, Graduate School; Michael Rohd, Director, Co-Lab for Civic Imagination

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

Executive Sponsor: Scott Whittenburg, Vice President for Research and Creative Scholarship

Project Leads: Paul Gladen, Associate Vice President for Research & Economic Development; Drew Reinert, Research Liaison

Strengthen institutional processes for respectfully partnering with tribal communities, serving Indigenous members of the Griz community, and recognizing the sovereignty of Indigenous nations

Executive Sponsor: Kelly Webster, Chief of Staff and Associate Vice President for Strategic Planning and Implementation

Project Lead: Karla Bird, Tribal Outreach Specialist

Priorities addressed

PFA 1: STUDENT SUCCESS

PFA 2: ACADEMICS & RESEARCH

PFA 4: PARTNER WITH PLACE

PFA 5: TELL THE UM STORY

Objective 6

Attract and support employees through improved recruiting, retention, and management efforts

Projects

Implement new strategies and processes in seeking, attracting, and onboarding talent

Executive Sponsor: Shawn Blair, Interim Associate Vice President of Human Resource Services

Project Leads: Libby Newman, Compensation Manager; Marcie Briggs, Director of Recruitment and Compensation

Design improved processes for developing managers and supporting performance management

Executive Sponsors: Shawn Blair, Interim Associate Vice President of Human Resource Services; Amy Kinch, Deputy Chief of Staff and Special Assistant on Campus Relations

Project Lead: Jasmine Laine, Director, Office of Organizational Learning and Development

Build deeper organizational capacity in HRS and conflict prevention and resolution

Executive Sponsors: Seth Bodnar, President, Amy Kinch, Deputy Chief of Staff and Special Assistant on Campus Relations

Project Leads: Alicia Arant, Associate Vice President of Conflict Resolution and Policy; Shawn Blair, Interim Associate Vice President of Human Resource Services

Priorities addressed

PFA 3: PEOPLE ALWAYS

PFA 4: PARTNER WITH PLACE

PFA 5: TELL THE UM STORY

Objective 7

Broaden alumni, community, and donor engagement

Projects

Shape the UM narrative and empower external partners to promote and showcase the University of Montana's brand, accomplishments, and impact

Executive Sponsor: Jenny Petty, Vice President for Marketing & Communications

Project Leads: Andy Chapman, Director of Brand Strategy; Dave Kuntz, Director of Strategic Communications

Expand and deepen Alumni's campus and community partnerships

Executive Sponsor: Mary Kreta, Vice President for Enrollment Management and Strategic Initiatives

Project Lead: LeAnn Layton, Director, Alumni Relations

Develop a joint UM/UM Foundation strategy for impactful growth in philanthropic giving

Executive Sponsor: Cindy Williams, President and CEO, UM Foundation

Project Lead: Kate Jennings, Vice President of Development, UM Foundation

Adapt Grizzly Athletics and the Adams Center to foster a championship culture, build Griz pride, and further position campus as a hub for community and statewide engagement

Executive Sponsors: Kent Haslam, Director, Intercollegiate Athletics; Paul Lasiter, Vice President for Operations and Finance

Project Leads: Sheryl Brown, General Manager, Adams Center; Chuck Maes, Senior Associate Athletic Director, Facilities and Events

Priorities addressed

PFA 1: STUDENT SUCCESS

PFA 2: ACADEMICS & RESEARCH

PFA 3: PEOPLE ALWAYS

PFA 4: PARTNER WITH PLACE

PFA 5: TELL THE UM STORY

Objective 8

Strengthen core infrastructure and processes to mitigate risk and improve students' and employees' campus experiences

Projects

Design data structures and processes that support decision making

Executive Sponsor: Zach Rossmiller, Associate Vice President for Information Technology and Chief Information Officer

Project Lead: Pope Ashworth, Interim Director of Institutional Research

Modernize Banner to increase efficiencies and capabilities for employees and students

Executive Sponsor: Zach Rossmiller, Associate Vice President for Information Technology and Chief Information Officer

Project Lead: Corey Cardoza, Deputy Chief Information Officer, Enterprise & Strategic Technology

Implement One Digital Identity—a single username and email address with multi-factor authentication—to provide a simpler, integrated user experience for students and employees and to mitigate security and privacy risks

Executive Sponsor: Zach Rossmiller, Associate Vice President for Information Technology and Chief Information Officer

Project Leads: Jonathan Neff, Chief Information Security Officer; Scott Holgate, Executive Director of Cyberinfrastructure

Priorities addressed

PFA 1: STUDENT SUCCESS

PFA 2: ACADEMICS & RESEARCH

PFA 3: PEOPLE ALWAYS



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