FY25

Annual Playbook

UNIVERSITY OF MONTANA

Mission

At the University of Montana our mission is simple

Our mission is inclusive prosperity

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

Prosperity

We aspire to cultivate prosperity on an individual and collective level.

Prosperity is characterized by meaningful work that enables individuals to support themselves and their families. Prosperity is also marked by healthy relationships, lifelong curiosity, and a deep sense of responsibility to one's community.

We enhance the collective prosperity of our community by developing an educated workforce to fuel job growth and business formation, as well as an informed, engaged citizenry that is vital to a healthy democracy. We produce new knowledge and work collectively with local, state, and national partners to tackle complex challenges and address urgent needs.

Inclusion

We aspire to serve learners from all backgrounds and any hometown large or small, and we are deeply committed to making a UM education both accessible and affordable for all.

We also aspire to serve learners at all stages of their lives and careers by providing a platform for learning that is adaptable and durable—whether individuals are just graduating high school, serving our country, seeking to progress in their careers, or looking for a fresh start. In partnership with employers, industry, and other educators, we forge new ways to serve those who may have never imagined that higher education was for them.

We cultivate an engaged citizenry and healthy democracy by bringing into conversation diverse perspectives to build solutions together.

New ways of learning

We aspire to create a better future by reshaping how we deliver education.

We recognize the diversity in how human beings learn and are dedicated to serving our students and employees as whole individuals in search of meaning, well-being, career fulfillment, and community connection.

Priorities for Action

UM's Priorities for Action serve as values that guide our 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.

Our Approach to Strategy

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. 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 Inclusive Access and Success Plan, contribute to meeting our objectives.

Objective 1

Increase enrollment through recruitment and access

Project

Strengthen prospective student communications and engagement

Project purpose: To ensure the timely, persuasive and effective execution of enrollment communications and engagement so that we meet enrollment goals.

Project Leads: Sydney Hovenkotter and Kelly Nolin
Executive Sponsors: Chief Enrollment Officer and Jenny Petty

Objective 2

Increase retention and persistence through enhanced student experiences

Project

Enhance student well-being through a robust community of care

Project purpose: To support wellbeing as a major factor in student success through a robust community of care and prevention efforts so that we strengthen the ecosystem of a healthy campus community.

Project Lead: Kayli Julius
Executive Sponsor: Leslie Webb

Project

Enhance Native American student access and culturally informed support

Project purpose: To more deeply understand the strengths brought by Native American students and to understand their experiences navigating UM systems so that we can design more culturally informed processes that honor and serve these students.

Project Leads: Karla Bird and Michelle Guzman
Executive Sponsors: Leslie Webb and Kelly Webster

Project

Continue building consistency and excellence in advising

Project purpose: To enhance advisor hiring, onboarding, training, and operational practices so that advisors can support students' ability to progress toward a degree in a timely manner.

Project Leads: Brian French and Shonna Trowbridge
Executive Sponsor: Leslie Webb

Project

Cultivate excellence in teaching, learning, and assessment through evidence-based practices

Project purpose: To cultivate evidence-based teaching practices so that we bolster student engagement and outcomes, reduce DFW rates, and improve instructor efficacy.

Project Lead: Amy Ratto Parks
Executive Sponsor: Adrea Lawrence

Objective 3

Differentiate UM through an integrated curricular and co-curricular journey that emphasizes academics, service, leadership, and career preparation

Project

Establish an annual process for assessing the health of our offerings, curricular complexity, responsiveness to student needs and desired outcomes, and compliance with regulatory requirements

Project purpose: To develop processes for ongoing review of academic offerings so that we remain responsive to changes, meet compliance requirements, and enter a cycle of doing less, better.

Project Lead: John DeBoer
Executive Sponsor: Adrea Lawrence

Project

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

Project purpose: To develop the expectations and opportunities for students to practice civil dialogue and collaboratively designed solutions so that they can contribute to democracy as engaged citizens.

Project Leads: Michael Rohd and Katie Vaughan
Executive Sponsor: Kelly Webster

Project

Develop and communicate a student experience framework that integrates the curricular and co-curricular experience and emphasizes UM's commitment to academics, service, leadership, and career development

Project purpose: To clearly articulate the UM student experience so that we effectively communicate UM's strengths to prospective students, build brand awareness, and improve institutional reputation.

Project Leads: Theresa Floyd, Stephanie Geyer, Brian Reed
Executive Sponsors: John DeBoer, Jenny Petty, Leslie Webb

Objective 4

Differentiate UM by serving the needs of a wider range of learners through partnerships and clearer curricular pathways

Project

Build market-driven online degree programs

Project purpose: To develop online degree programs so that UM is responsive to a broader range of students, giving them greater access and more flexible learning opportunities.

Project Lead: Eric Vorkoeper
Executive Sponsor: Shara Tscheulin

Project

Design and implement partnerships that position UM as a platform for learning

Project purpose: To partner with businesses and peer institutions in the design and delivery of learning so that UM serves as a connector and facilitator of diverse educational opportunities rather than a discrete provider of education.

Project Leads: Tom Gallagher and Brad Goan
Executive Sponsor: Shara Tscheulin

Project

Design and implement non-credit to credit pathways in collaboration with colleges

Project purpose: To collaboratively develop non-credit to credit pathways so that we increase access to higher education and provide more flexible credentialing options that meet the needs of learners at all stages of their lives.

Project Leads: Kristina Berger, Grace Gardner, Paul Gladen
Executive Sponsor: Shara Tscheulin

Project

Map user experiences for a wider range of learners, from inquiry to completion

Project purpose: To map student experiences so that we can improve business processes and better serve students at all stages of their lives.

Project Lead: Julie Cahill
Executive Sponsor: Shara Tscheulin

Objective 5

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

Project

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

Project purpose: To apply UM's expertise and educational programs in mental and behavioral health so that we support the State's behavioral health workforce needs.

Project Leads: Lily Apedaile, Michael Rohd, Faculty TBD
Executive Sponsor: Brad Goan

Project

Engage state, federal, and private partners in key research areas, e.g., AI/machine learning, human performance, cyber, biotech, health outcomes, climate, integrated environment, and autonomous systems

Project purpose: To match UM strengths with immediate funding opportunities and urgent needs so that we maintain our Carnegie Research Very High Activity (R1) designation, which impacts faculty recruitment, supports additional graduate students, brings additional revenue to UM, and bolster's UM's reputation.

Project Leads: Lily Apedaile, Jeremy Crowley, Drew Reinert
Executive Sponsor: Scott Whittenburg

Objective 6

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

Project

Implement new strategies and processes in seeking and attracting talent

Project purpose: To develop and articulate our employee value proposition and implement new recruitment strategies so that we are attracting and retaining talented employees.

Project Lead: Marcie Briggs
Executive Sponsor: Jay Stephens

Project

Design and test a revamped performance development process

Project purpose: To design and test a revamped performance development process so that we leverage the potential for managers/supervisors to positively impact employee engagement, morale, retention, and productivity.

Project Lead: Shawn Blair
Executive Sponsor: Jay Stephens

Project

Implement new strategies and processes in onboarding talent

Project purpose: To implement new strategies and processes in onboarding talent so that we increase employee engagement, improve productivity, and reduce attrition.

Project Lead: Jasmine Laine
Executive Sponsor: Jay Stephens

Objective 7

Broaden alumni, community, and donor engagement

Project

Shape the UM narrative and empower external partners to promote UM's brand, accomplishments, and impact through community engagement

Project purpose: To leverage a broader base of storytellers on UM's behalf so that we build brand awareness, affinity, and confidence in the University's impact.

Project Leads: Dave Kuntz and LeAnn Layton
Executive Sponsors: Jenny Petty

Project

Build Griz pride in UM as a hub for community and statewide arts and athletics engagement

Project purpose: To expand UM's offerings as a hub for arts and athletics engagement so that we enhance UM's reputation, grow revenue, foster economic growth in the region, and enhance community vitality and cohesion.

Project Lead: Paula Short
Executive Sponsor: Kent Haslam

Project

Expand and deepen Alumni's campus and community partnerships in support of students' access to networks and mentorships

Project purpose: To develop and strengthen alumni partnerships so that we support students' career readiness by bridging the gap between academic learning and real-world experience and providing students access to industry insights and professional guidance.

Project Leads: LeAnn Layton and Andrea Vernon
Executive Sponsors: Jenny Petty and Leslie Webb

Objective 8

Strengthen core infrastructure and processes to improve students' and employees' campus experiences, enhance efficiencies, and maintain safety and integrity

Project

Design data structures and processes that support decision making

Project purpose: To enhance data quality, structures, and processes so that trustworthy data is available to support decision-making.

Project Leads: Pope Ashworth and Jeanne Loftus
Executive Sponsor: Zach Rossmiller and Brad Goan

Project

Simplify student and employee user experience

Project purpose: To create a single user identity for accessing all UM technology systems so that we simplify the user experience and reduce security threats.

Project Leads: Scott Holgate and Jonathan Neff
Executive Sponsor: Zach Rossmiller

Project

Modernize Banner to increase efficiencies and capabilities for employees and students

Project purpose: To move the Banner system toward "baseline" and implement modern tools so that the system is more user-friendly for students and employees, and more easily managed and maintained.

Project Lead: Corey Cardoza
Executive Sponsor: Zach Rossmiller

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