

FY27

Annual Playbook

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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.

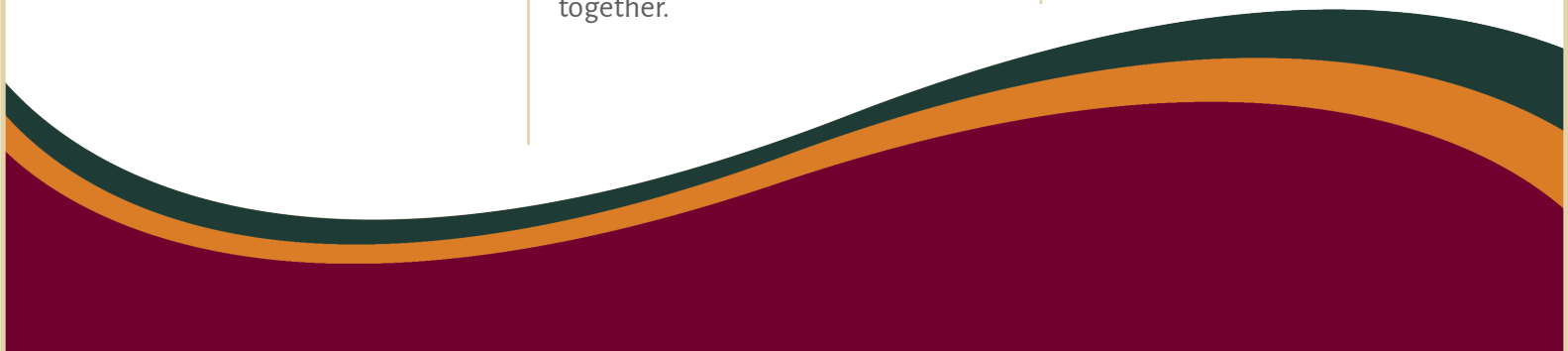
We also aspire to serve learners at all stages of their lives and careers by providing a platform for learning that is adaptable and durable—whether individuals are just graduating high school, serving our country, seeking to progress in their careers, or looking for a fresh start. In partnership with 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. Each year we review our mission and strategic vision, assess the progress we've made over the course of the year, and develop a playbook for the year ahead to move us toward our collective vision.

As part of this process, we:

- Celebrate successes and extract lessons to inform future decisions.
- Examine the external environment to identify emerging challenges and opportunities.
- Consider where to invest precious human and financial resources for highest impact.

Alignment

The projects named in our annual Playbook reflect just a portion of initiatives underway across UM to advance our shared objectives. Academic Affairs, Research and Creative Scholarship, Student Affairs and Enrollment Management, People and Culture, and Marketing and Communications all have sector-level strategic plans that are responsive to shared UM objectives. Other areas of campus are working intentionally to align their work with those same objectives. As sectors and units across campus pursue strategy aligned with our shared mission, vision, and objectives, we are collectively contributing to a future of inclusive, sustainable prosperity.

Building momentum

In recent years, deliberate strategic thinking and execution have built real momentum. After a decade of declining enrollment, UM has seen enrollment growth, for five consecutive years. More than 10,000 learners also engage in non-credit education and training programs. We have evolved academic programming to meet societal needs, achieved R1 research status, and rebuilt a vibrant campus atmosphere in the wake of the pandemic. Our FY27 Playbook carries that momentum forward.

This year's playbook contains seven long-term objectives that focus on enrollment and student success; student wellbeing, leadership, service, and civic engagement; serving a wider range of learners; research and economic development; external engagement; enhancing the employee experience; and improving core infrastructure.



Objectives & Projects





Objective 1

Improve student recruitment, access, retention, persistence, and completion

Project 1.1

Strengthen current student communications

Project purpose: To improve communication to students so that they can more easily understand, navigate, and act on information that supports their success.

Project Leads: Claudine Cellier and Devin Carpenter

Executive Sponsor: Leslie Webb

Project 1.2

Drive the design and implementation of an undergraduate advising model that responds to current and future student needs and expectations

Project purpose: To support student success through aligned advising ecosystems, standardized policies and procedures, consistent and high-quality professional development, and coordinated caseload support for colleges.

Project Leads: Brian French and Brian Reed

Executive Sponsor: Leslie Webb

Project 1.3

Enhance Native American student success and Tribal partnerships by acknowledging and implementing the tenets of Tribal sovereignty

Project purpose: To partner with Tribal Nations in shaping pathways, supports, and experiences so that Native American students persist and complete at parity.

Project Leads: Karla Bird, Kristina Lucero, and Michelle Guzman

Executive Sponsor: Adrea Lawrence

Project 1.4

Cultivate excellence in general education by developing a collaborative, cross-disciplinary assessment

Project purpose: To equip faculty with adaptable, evidence-based teaching strategies for gateway courses so that we strengthen student success, boost academic confidence, and improve degree completion.

Project Leads: Amy Ratto Parks and Lauren Fern

Executive Sponsor: Adrea Lawrence



Objective 1

Improve student recruitment, access, retention, persistence, and completion

Project 1.5

Refine our strategic approach to graduate and professional enrollment, including exceeding the doctoral completer requirement to maintain R1 status

Project purpose: To strategically align graduate and professional offerings with student and market needs and program insights so that enrollment and outcomes improve.

Project Lead: Ke Wu and Brad Goan

Executive Sponsor: Paul Lukacs

Project 1.6

Develop integrated and effective student financial services functions

Project purpose: To integrate financial aid and student accounts functions so that we improve effectiveness in service, systems, and processes.

Project Leads: Drew Riley and Stacey Eve

Executive Sponsor: Leslie Webb

Project 1.7

Establish a representative academic AI Working Group to provide academic direction, develop shared principles, identify risks and opportunities, and recommend guardrails that align AI use in teaching, research, and academic operations with UM's academic mission, sustainability commitments, and shared decision-making traditions

Project purpose: To strengthen faculty-led AI principles and guardrails so that instruction, assessment, and credential value remain aligned and credible.

Project Leads: Amy Ratto Parks and Michael Cassens

Executive Sponsor: Adrea Lawrence

Project 1.8

Define reduced credit bachelor degrees and alternatives, assess the models and alternatives in the context of UM's current mission, programs, enrollment strategy, and post-graduate outcomes, and identify promising opportunities to present to UM leadership and faculty

Project purpose: To explore the design of more flexible and accelerated pathways so that students can complete degrees more quickly and affordably.

Project Leads: Dominic Beccari, Isho Tama-Sweet, and Soazig LeBihan

Executive Sponsor: John DeBoer



Objective 1

Improve student recruitment, access, retention, persistence, and completion

Project 1.9

Prioritize and improve internal systems and process design at the intersection of the student and employee experiences

Project purpose: To redesign internal systems, processes, and cross-unit practices in ways that reduce friction for both students and employees, and improve institutional effectiveness.

Project Leads: Brian Reed and Pamela Altmaier

Executive Sponsor: Leslie Webb

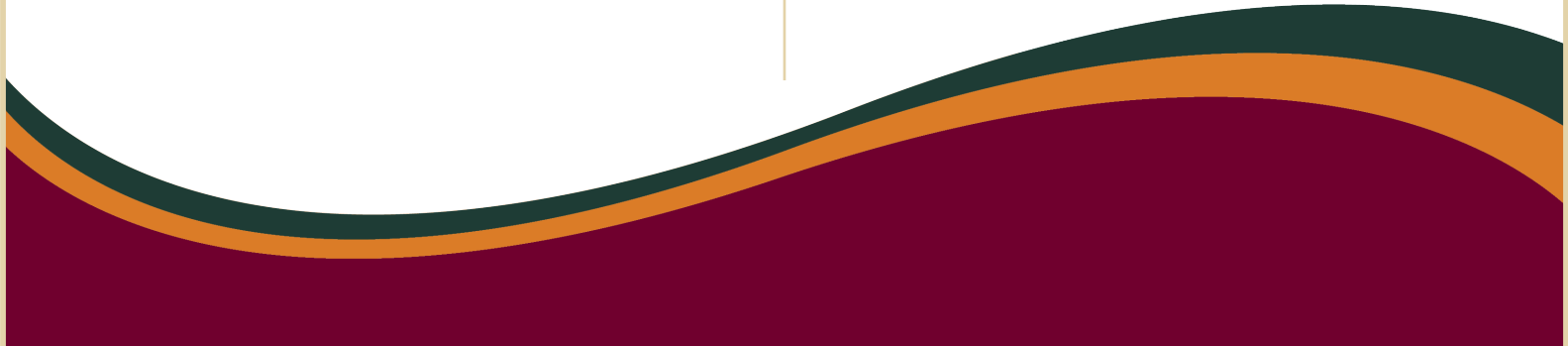
Project 1.10

Transform umt.edu into a cohesive, student-centered digital experience that leads with UM's value proposition, earns trust and removes barriers

Project purpose: To reposition UM's digital assets for student recruiting, build a student-centered digital experience, and optimize umt.edu for the primary purpose of serving prospective and current student needs.

Project Leads: Corey Cardoza, Mark Lannen, and Stephanie Geyer

Executive Sponsor: Dave Kuntz





Objective 2

Prioritize wellbeing, civic engagement, and career readiness as critical components of the UM student journey

Project 2.1

Amplify student engagement, wellbeing, and experience through a coordinated framework

Project purpose: To create a coordinated, student-centered framework that integrates wellbeing, civic engagement, leadership, student involvement, and career readiness across the UM journey, and helps units connect their student experience work more consistently to deliver on UM's value and impact.

Project Lead: John Nugent

Executive Sponsor: Leslie Webb

Project 2.2

Develop a coordinated approach to support the free exchange of ideas at campus programs

Project purpose: To review our policies and procedures to ensure UM protects the free exchange of ideas.

Project Lead: Jeanne Loftus

Executive Sponsor: Leslie Webb

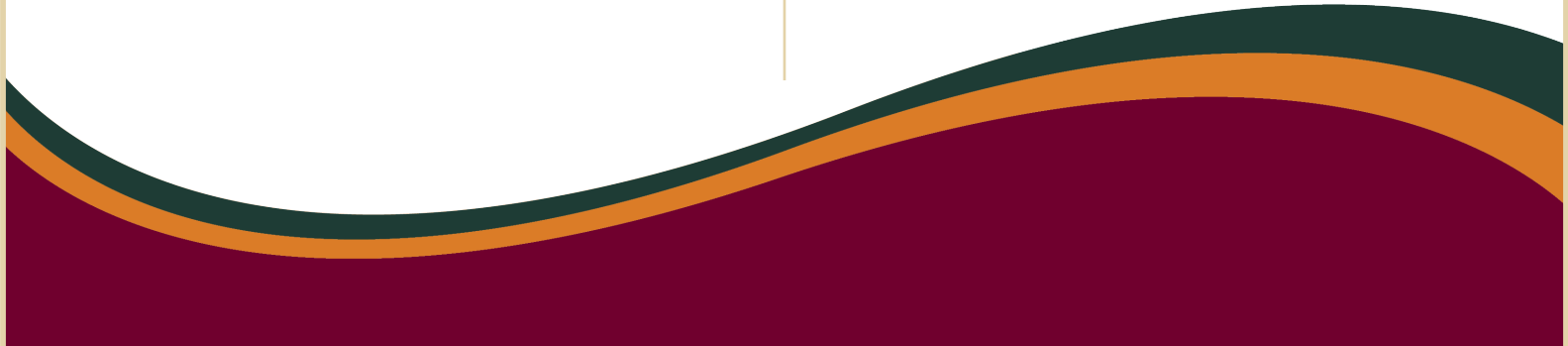
Project 2.3

Coordinate strategic external partnerships to strengthen student, community and industry impact

Project purpose: To coordinate and align the University's engagement with employers, industry partners, community organizations, government agencies, alumni, and other external partners to support a more strategic and connected approach.

Project Leads: Andrea Vernon, LeAnn Layton, and Mike Fisher

Executive Sponsor: Brian Reed



Objective 3

Establish UM as a platform for learning to serve the needs of a wider range of learners

Project 3.1

Establish UM as the regional leader in online education through a focus on academic quality and innovation, support for teaching excellence, and expanded access for a wider range of learners

Project purpose: To strengthen the quality of online education so that access expands to a wider range of learners without compromising integrity or value.

Project Lead: Amy Ratto Parks and Rebecca Kranitz

Executive Sponsor: Shara Tscheulin

Project 3.2

Develop a comprehensive and financially sustainable noncredit training portfolio

Project purpose: To expand noncredit offerings to grow access, meet workforce needs, and strengthen pathways into degree programs.

Project Leads: Brad Goan and Julie Cahill

Executive Sponsor: Shara Tscheulin

Project 3.3

Establish a coordinated, institution-wide dual enrollment strategy that expands access, strengthens K-12 partnerships, and improves high school student engagement with UM

Project purpose: To expand and coordinate dual enrollment pathways to increase college readiness and early access to UM.

Project Leads: Drew Riley, Grace Gardner, and Julie Cahill

Executive Sponsor: Shara Tscheulin

Project 3.4

Adapt our systems and processes to support a wider range of learners

Project purpose: To adapt systems and processes to improve access, navigation, and outcomes for a wider range of learners.

Project Leads: Brad Goan and Julie Cahill

Executive Sponsor: Shara Tscheulin

Objective 4

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

Project 4.1

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

Project purpose: To coordinate interdisciplinary expertise to more effectively address Montana's behavioral health needs.

Project Leads: Amanda Cahill, Michael Rohd, and Roni Johnson

Executive Sponsor: Brad Goan

Project 4.2

Develop a strategy with state, federal, and private partners to grow UM research and creative activities in response to changing federal and state priorities in key research areas and to remain a top-tier R1 research university

Project purpose: To engage external partners proactively and strategically to support research growth and ensure that UM's research investigators and creative scholars are able to respond quickly to shifting federal and state priorities.

Project Leads: Drew Reinert, Erika Hildner, and Lily Apedaile,

Executive Sponsor: Paul Lukacs

Project 4.3

Improve research support systems, processes, and services

Project purpose: To optimize research administration for principal investigators and research support staff so that we effectively and efficiently support research on campus and maintain R1 classification.

Project Leads: Katherine Swan and Nicole Thompson

Executive Sponsor: Paul Lukacs

Objective 5

Broaden UM's engagement with alumni, donors, and community members

Project 5.1

Promote our impact and deepen confidence in UM through community engagement across Montana and in key national markets with strong UM ties

Project purpose: To promote UM's impact across Montana and in key national markets to strengthen public confidence in the University and deepen relationships that drive advocacy, philanthropy, enrollment, and long-term connection to UM's mission and public value.

Project Leads: Dave Kuntz and Jay Beagle

Executive Sponsor: LeAnn Layton

Project 5.2

Build organizational momentum and philanthropic engagement around the University's highest strategic priorities to advance opportunities that serve students, serve Montana, and position the institution for long-term impact

Project purpose: To align institutional leaders, volunteers, and philanthropic partners around the University's highest strategic priorities, building the case, capacity, and momentum necessary to secure transformative investment and advance priority initiatives.

Project Leads: Heather Rue, Jamie Stanton, and Kara Fleharty

Executive Sponsor: Cindy Williams

Project 5.3

Develop an institutional plan to ensure NCAA Division I athletic success: graduating student athletes and developing leaders, winning conference championships, regularly competing in NCAA postseason opportunities, and winning a national championship in football

Project purpose: To pursue Division I Athletics excellence and success as a means of building school pride, growing community engagement, and enhancing philanthropic support.

Project Leads: Greg Sundberg and Jean Gee

Executive Sponsor: Kent Haslam

Objective 6

Enhance the employee experience to support engagement, job performance, and career development

Project 6.1

Establish clear, practical expectations for managers—defining leadership competencies, behaviors and core responsibilities—and align development, evaluation, and accountability systems to those standards

Project purpose: To define and support effective management practices to enhance workplace culture and employee performance.

Project Leads: Alicia Arant, Jasmine Laine, and Shawn Blair

Executive Sponsor: Jay Stephens

Project 6.2

Leverage NEOED Learn to implement employee trainings for key processes: Banner, travel, procurement, recruitment, and hiring

Project purpose: To provide important process and systems training so that employees can perform their work effectively.

Project Leads: Kit Edington, Marcie Briggs, Matt Weber, and Michelle Wunder

Executive Sponsor: Jay Stephens

Project 6.3

Equip employees with AI fluency, clear guardrails, and practical tools to improve operations and enhance employee experience

Project purpose: To develop employee AI fluency and provide tools and guardrails to support employee engagement and retention, making UM a place where people grow and do their best work.

Project Leads: Corey Cardoza and David Niekamp

Executive Sponsor: Zach Rossmiller

Objective 7

Improve core infrastructure to support strategic objectives

Project 7.1

Develop and communicate strategic priorities and key projects in core operational areas (e.g., technology, data, financial, compliance and policy, and physical infrastructure)

Project purpose: To define and communicate a core infrastructure roadmap that focuses and aligns operational efforts that provide high value to students, faculty, and staff.

Project Lead: Eva Rocke, Kate Duran, and Pope Ashworth

Executive Sponsors: Brad Goan, Lucy France, Paul Lasiter, Paula Short, and Zach Rossmiller

Project 7.2

Advance campus renewal by opening the new residence hall and inviting philanthropic support for priority capital projects, including the construction of a new science and conservation building as well as renovation of the Music Building

Project purpose: To invest in modern dynamic spaces that support high-quality accessible learning, world-class research, and collaboration required for a 21st century education.

Project Lead: Jameel Chaudhry, Jennifer Cavanaugh, and Libby Metcalf

Executive Sponsor: Paula Short

Project 7.3

Maximize our built environment as an expression of our brand through coordinated improvement to our visual identity (e.g., wayfinding, signage, landscaping) to support recruitment and investment

Project purpose: To maximize the student, employee, and visitor on-campus experience by aligning UM's visual identity with consistent branding, messaging, wayfinding, and landscaping.

Project Lead: Jenny Lavey, Kelly Nolin, and Paula Short

Executive Sponsor: Dave Kuntz



Office of Strategic Planning and Implementation

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