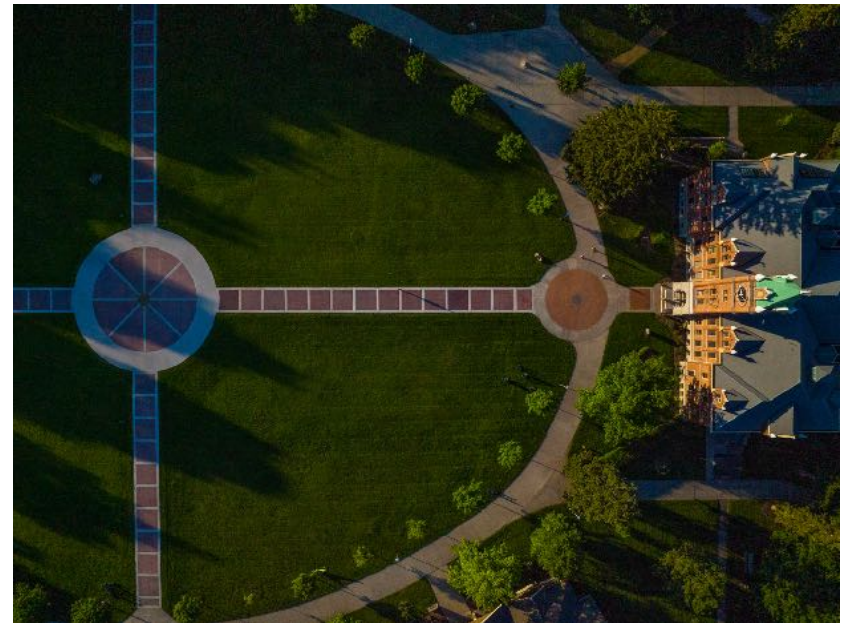


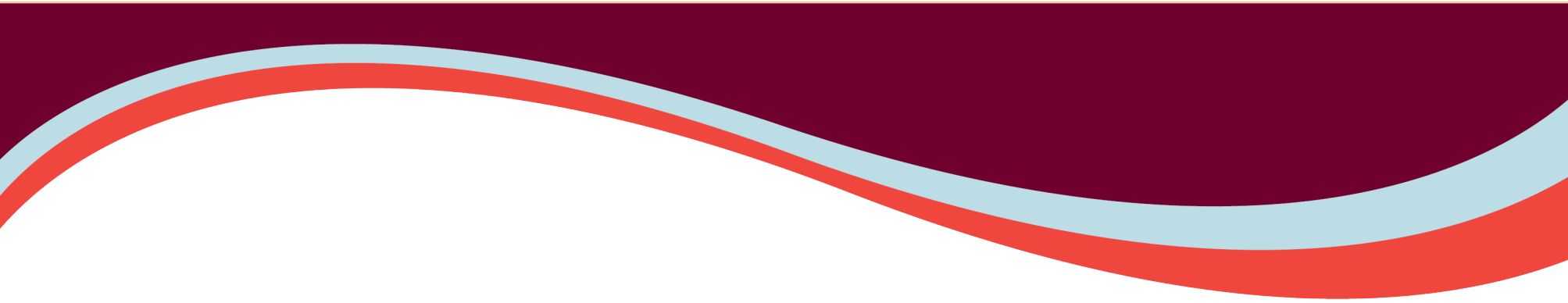
FY26

Strategy Annual Report

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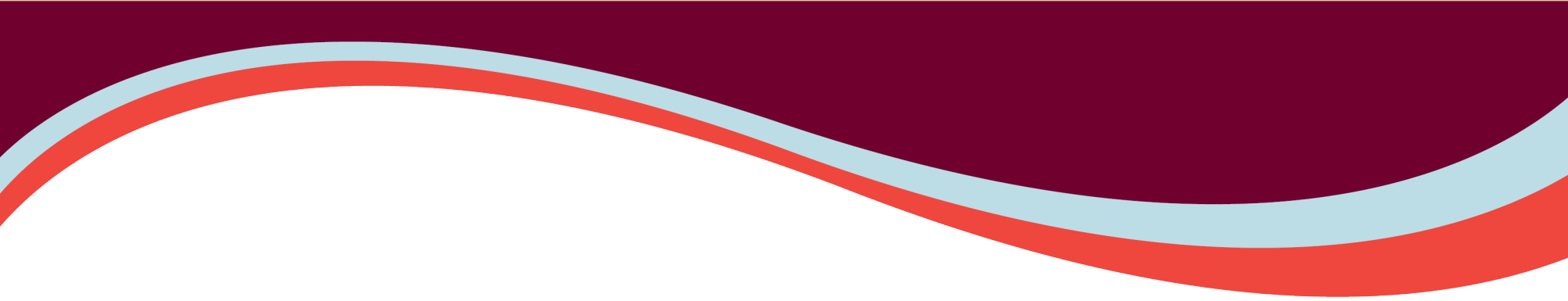


Introduction

At the University of Montana, we believe that public higher education should be both excellent and accessible. We pursue that ideal through intentional strategic thinking, decision-making, and execution of change initiatives.

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.

This annual report reflects a university that is growing, adapting, and leading with purpose as we work to shape a brighter future for Montana and the world.



Approach to Strategy

Effective strategy is an iterative process. 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 the process, we:

- Reflect on and celebrate successes and lessons learned
- Gather and synthesize insights from more than 100 campus leaders
- Examine the external environment to identify emerging challenges and opportunities
- Consider where to invest precious human and financial resources for highest impact
- Support project management and change management through workshops and direct assistance
- Communicate priorities and progress with campus

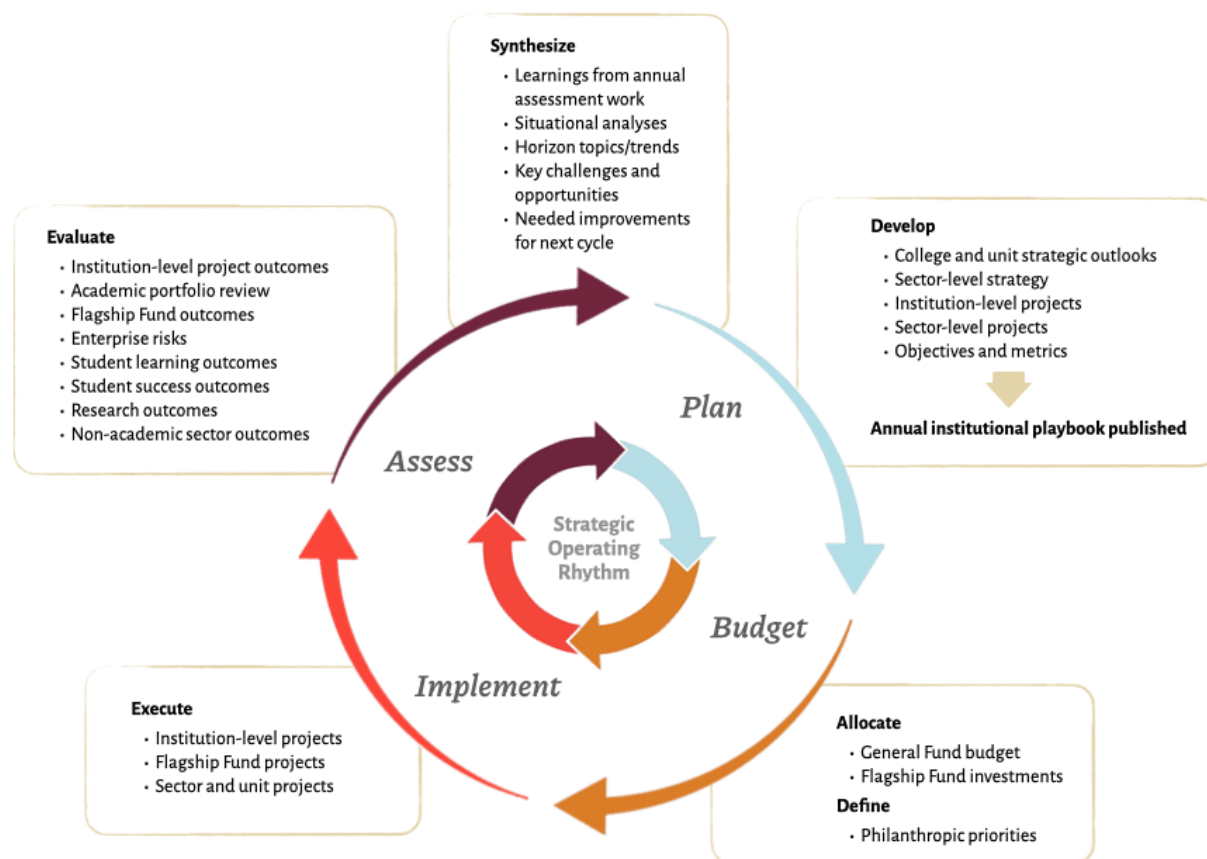
Approach to Strategy

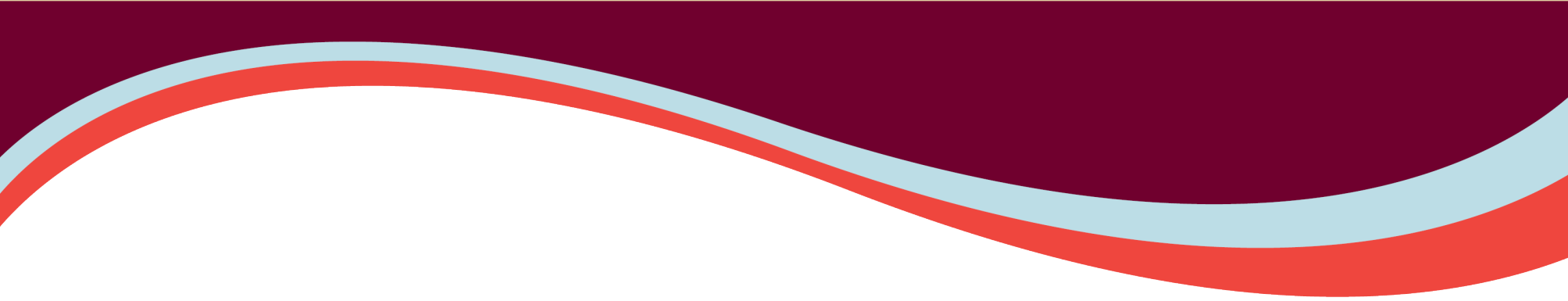
Strategic Operating Rhythm drives annual processes

A strategic operating rhythm defines a set of recurring interactions required to advance the operating performance of the University. It ensures that vital activities such as determining institutional priorities, executing on those priorities, and assessing progress and outcomes, are performed in a consistent manner and to a high degree of excellence.

UM's Strategic Operating Rhythm seeks to integrate:

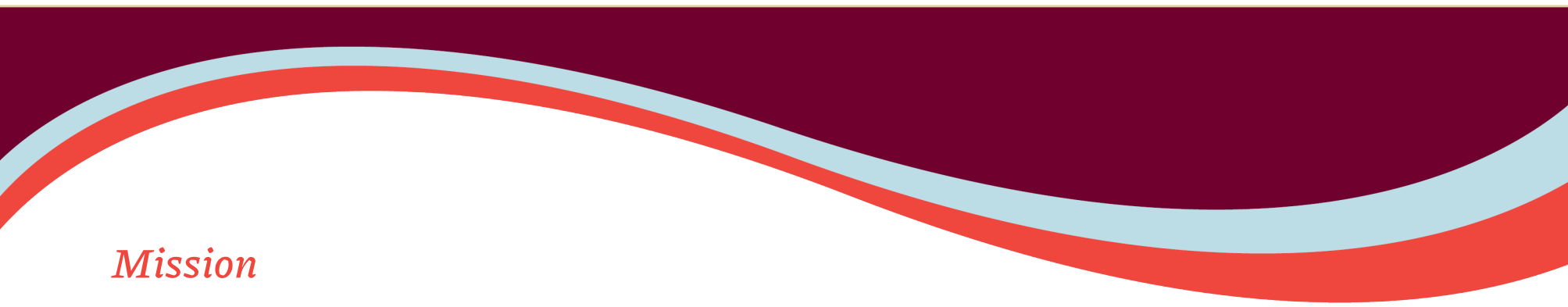
- Ongoing strategic thinking and planning
- Development of the Annual Playbook
- Strategy-driven and responsible budgeting
- Effective project implementation
- Continuous assessment of activities to ensure operational effectiveness





Mission, Vision, and Priorities for Action

The University of Montana's mission, vision, and priorities for action provide a clear foundation for our work and direction. They express who we are as an institution, what we aim to achieve, and the principles that guide our decisions. These statements inform our strategic direction and help align our efforts across campus. Together, they shape how we serve our students, our community, and the state of Montana.

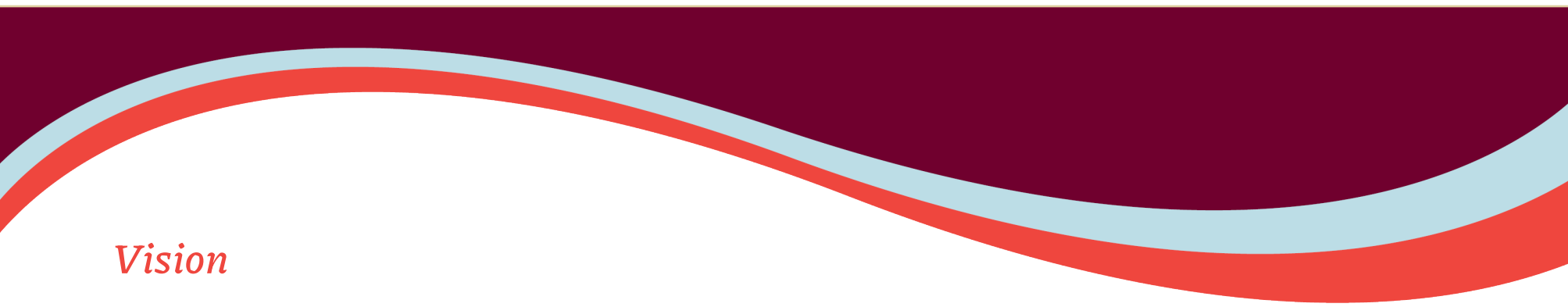


Mission

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

Five priorities for action have influenced UM strategy since 2018. These priorities have become embedded as core values that inform UM's culture and decision-making.

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

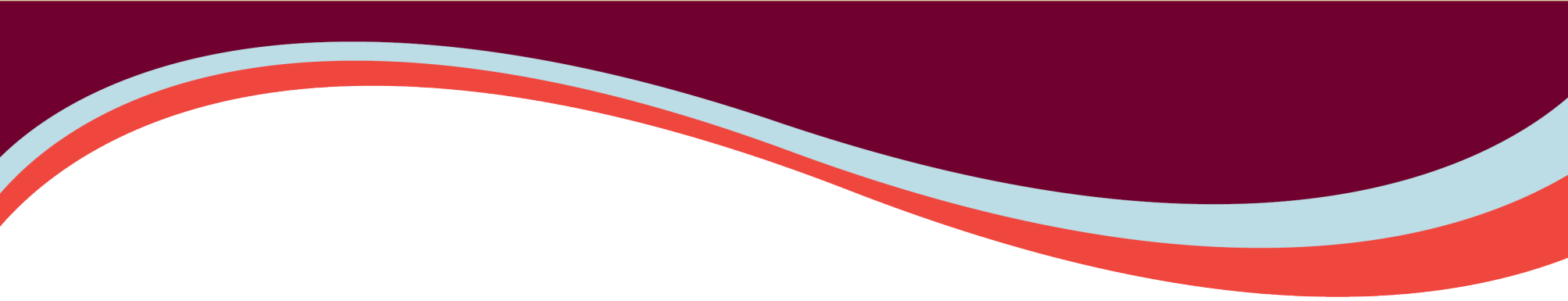
PARTNER WITH PLACE

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

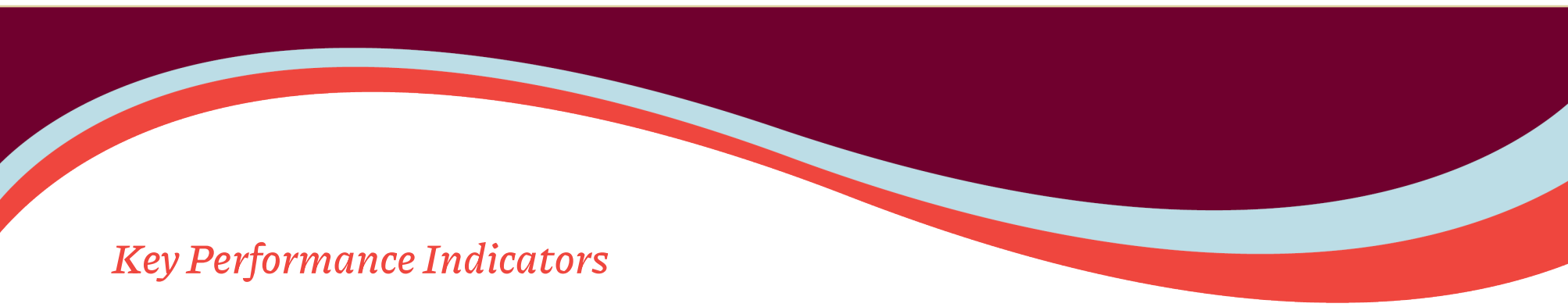
PROUDLY TELL THE UM STORY

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



Key Performance Indicators (KPIs)

Key Performance Indicators (KPIs) are measurable metrics that help us track progress toward strategic goals such as enrollment, student success, and research impact. They provide clarity on whether initiatives are making a difference.



Key Performance Indicators

University of Montana KPIs and definitions

Total headcount

Unduplicated count of students enrolled in all degree levels at Missoula College and University of Montana. (fall semester census)

Degrees and certificates awarded

Degrees awarded (all levels including certificates). Students who completed an academic program at any level during the summer, fall, and spring semesters. Main Campus, Missoula College, Graduate School, and Law School. (fiscal year)

Research expenditures

Annual grant and contract expenditures for the university and affiliated research organizations as reported to the NSF Higher Education Research and Development Survey. (fiscal year)

Employee turnover

(# of separations over past year/average # of employees reported last year and this year) x 100. Turnover rates are expressed as a percentage and are based on headcounts. Temporary and non-tenure track* positions are excluded. (fiscal year)

Operating margin

The ratio of revenues divided by expenses as reported in the University of Montana Financial Report. (fiscal year)

Community engagement

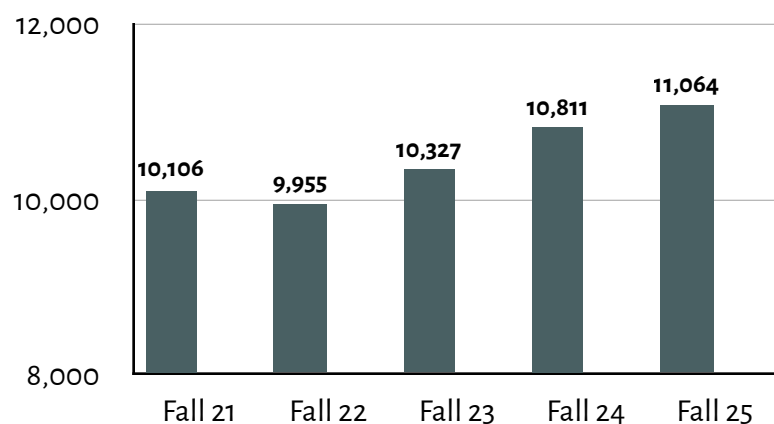
Measured using the Carnegie Foundation's Elective Classification for Community Engagement. (Status approved through 2031)

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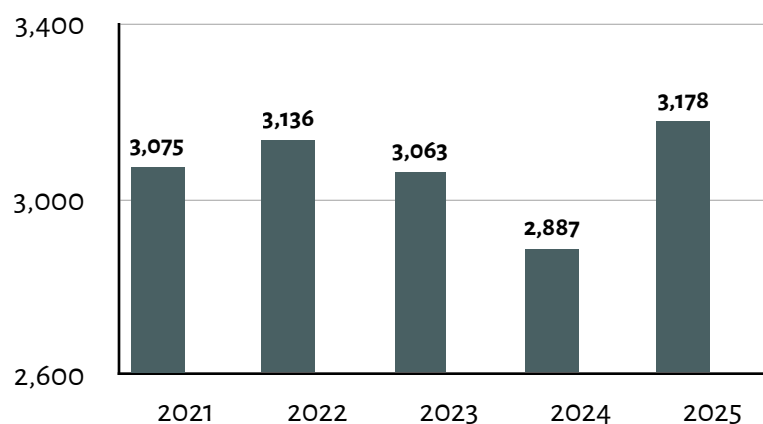
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Degrees and Certificates Awarded

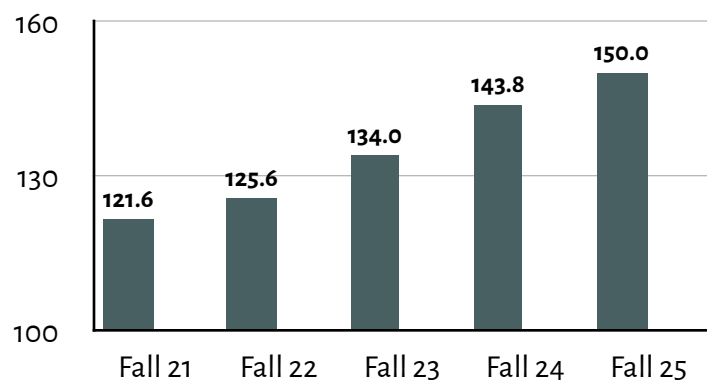
Degrees awarded (all levels including certificates). Students who completed an academic program at any level during the summer, fall, and spring semesters. Main Campus, Missoula College, Graduate School, and Law School. (fiscal year)



Key Performance Indicators

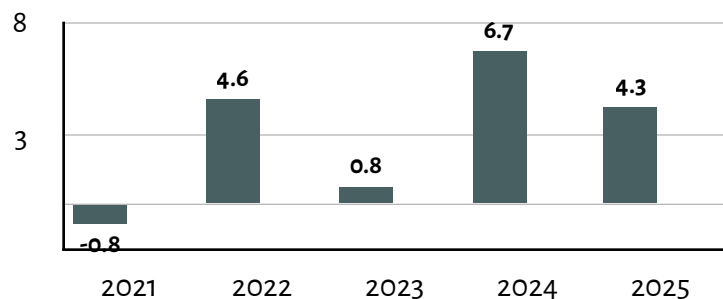
Research Expenditures (in millions)

Annual grant and contract expenditures for the university and affiliated research organizations as reported to the NSF Higher Education Research and Development Survey. (fiscal year)



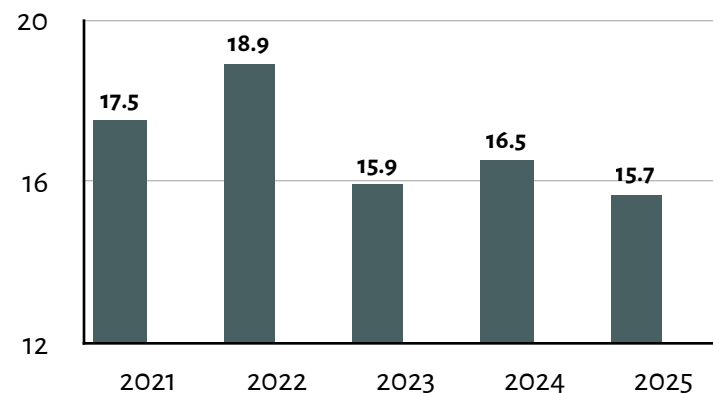
Operating Margin

The ratio of revenues divided by expenses as reported in the University of Montana Financial Report. (fiscal year)



Employee Turnover (percentage)

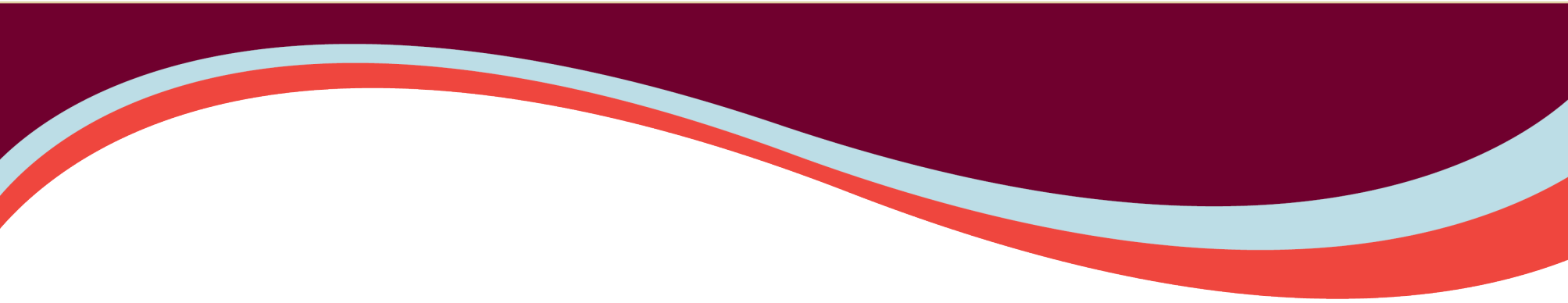
Turnover rates are expressed as a percentage and are based on headcounts. Temporary and non-tenure track* positions are excluded. (fiscal year)



Community Engagement

Measured using the Carnegie Foundation's Elective Classification for Community Engagement.

2021 Approved 2022 Approved 2023 Approved 2024 Approved 2025 Approved

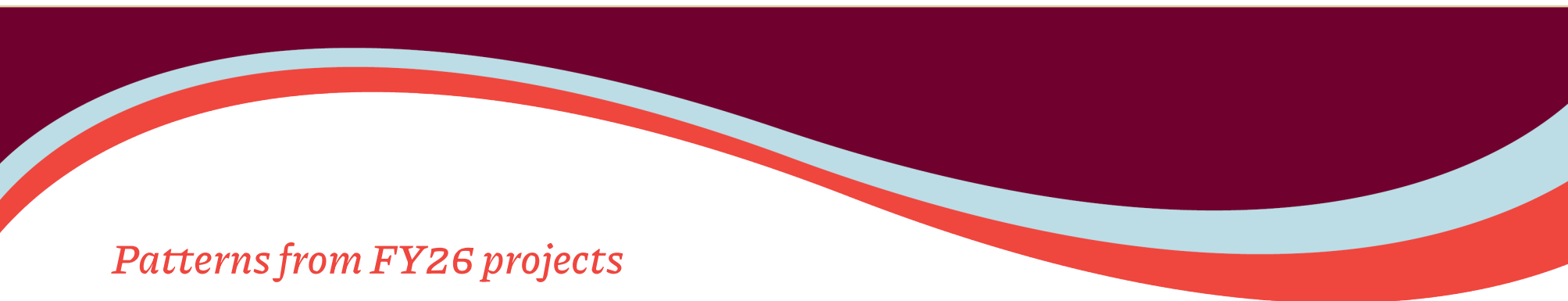


Objectives, Projects and Progress

The FY26 Playbook included seven objectives. Each objective had a suite of institutional projects contributing to those objectives. Playbook projects are determined based on criteria such as alignment with UM's vision and Priorities for Action, responsiveness to challenges and opportunities, urgency and potential impact, and the need for cross-unit efforts that require significant collaboration.

The next page provides a distillation of patterns that emerged from the FY26 portfolio of projects. The summary includes areas where we are improving, continuing challenges, and lessons learned.

Pages 16-30 list FY26 playbook projects, their intended purpose, project leads and executive sponsors, and a summary of actions taken and progress made.



Patterns from FY26 projects

Each spring, project leads submit a report that outlines achievements, encountered barriers, needed adjustments, and lessons learned from their project. OSPI also conducts focus groups with project leads to gain insights into improving project implementation and outcomes. Below are patterns that emerged from those assessment activities in Spring 2026.

Where we are improving

Moving from planning to implementation: More projects are producing and deploying tangible systems, processes, frameworks, and tools rather than remaining in discovery or design.

Systems and process modernization: There is growing capacity to replace fragmented or manual processes with more coordinated, standardized approaches.

Data-informed practices are becoming more applied: Last year, data collection and analysis were an emerging strength. This year there is more evidence of teams using data to shape decisions, improve services, communicate value, and adapt strategy.

Cross-unit collaboration is becoming more structured: Collaboration remains a strength, but there are signs that it is becoming more intentional through coordinating groups, recurring meetings, shared processes, and formal partnerships.

Human-centered design is broadening: The emphasis on lived experience from last year persists, but it now encompasses students, employees, learners, alumni, and community partners.

Continuing challenges

Human capacity remains a fundamental constraint: Bandwidth, staffing, and competing priorities continue to appear across projects.

Stakeholder adoption and change remain harder than designing solutions: Resistance, uneven engagement, and unclear incentives continue to slow implementation.

Systems, data, and process interdependencies: Modernization is improving, but projects continue to discover that one system or process rarely changes independently.

Lessons learned

Implementation is organizational change, not just project management: Good technical solutions, plans, or processes do not automatically produce adoption. Successful implementation requires attention to culture, incentives, responsibility, trust, and behavior.

Engage critical partners before designing the solution: Several projects learned that informing stakeholders is not the same as involving them.

Make the value concrete to accelerate adoption: People engage when they can see how a new tool, process, or initiative helps them accomplish work they already care about.

Objective 1

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

Strengthen current student and parent/ family communications

Project purpose: To improve communication to students so that they receive timely, relevant, and coordinated information.

Project Leads: Devin Carpenter and Claudine Cellier
Executive Sponsor: Leslie Webb

Actions taken and progress

- Launched *The Sentinel* as a centralized student newsletter to undergraduate students to communicate critical information, campus updates, and alerts. The newsletter uses the Student ESP platform as a tool to design and disseminate content.
- Engaged students and campus partners through focus group planning, collaborative work sessions, and outreach to better understand communication needs and build support for a coordinated communications strategy.
- Refined the project's direction based on early implementation by expanding the planned audience to include graduate and law students and shifting from highly segmented messaging to broader, more relevant communications.

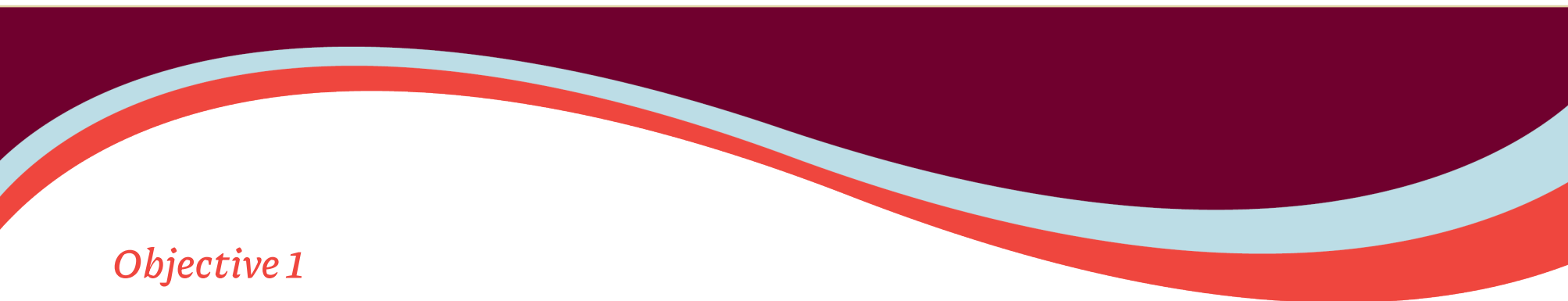
Drive the design and implementation of an undergraduate advising model that responds to current and future student needs and expectations

Project purpose: To streamline advising processes for the advising community so that we increase efficiency and effectiveness for students.

Project Leads: Rick Anderson and Nathan Domitrovich
Executive Sponsor: Leslie Webb

Actions taken and progress

- Completed a comprehensive review of academic advising, analyzing advisor workloads, caseloads, advising practices, documentation, and organizational structures to identify opportunities for improvement.
- Engaged advisors, students, faculty, and campus stakeholders through focus groups and feedback sessions.
- Identified significant variation in advising caseloads, expectations, and documentation practices, highlighting the need for improved workload balance, clearer standards, and stronger assessment of advising effectiveness.



Objective 1

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

Enhance Native American student access and success through culturally informed support

Project purpose: To foster understanding of Tribal sovereignty and self-determination so that we honor and embed these principles in our practices, processes, and student support efforts.

Project Leads: Karla Bird, Michelle Guzman, and Kristina Lucero
Executive Sponsor: Kelly Webster

Actions taken and progress

- Developed a Tribal Sovereignty Framework that advances the Campus community's understanding of Tribes as sovereign governments that deserve the same respect other sovereigns receive (WHAT); provides guidance for enhancing student support, curriculum development, engaging in culturally appropriate research, and other campus practices and policies (HOW); and fosters required professional development across campus.
- Launched activities to showcase and socialize the framework among UM employees to create visibility and buy in that we can turn into supported application in various areas across campus.

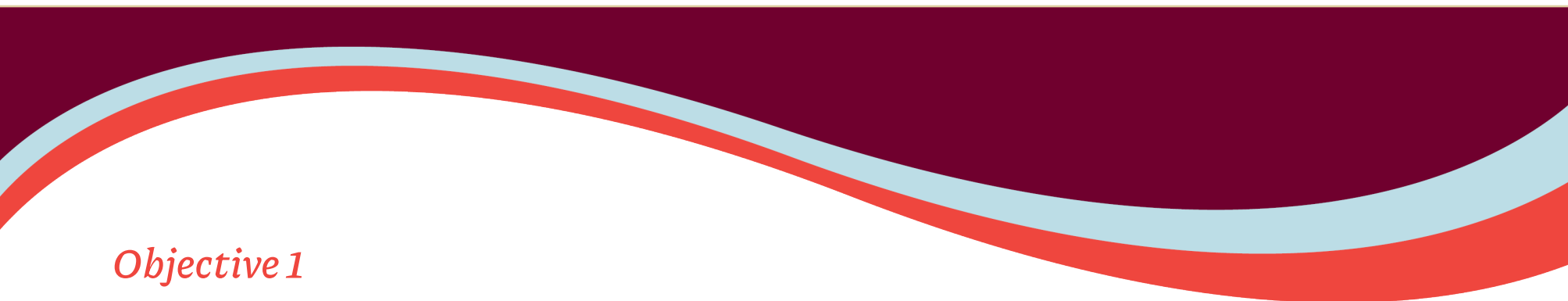
Cultivate excellence in teaching, learning, and assessment through evidence-based practices in foundational math and writing courses

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

Actions taken and progress

- Conducted a comprehensive analysis of gateway math and writing courses by integrating disaggregated DFW and completion data with student attrition surveys and instructor feedback to better understand barriers to student success.
- Developed and implemented student and instructor attrition surveys, collecting qualitative insights that complemented institutional data and informed evidence-based recommendations for improving gateway course outcomes.
- Identified significant patterns in student success, including disparities in gateway math outcomes across campuses and the importance of behavioral and life circumstances—rather than academic preparation alone—in influencing course completion.



Objective 1

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

Refine the strategic approach to graduate enrollment

Project purpose: To enhance outreach and experiences for graduate students so that we optimize their support and sustain UM's R1 status.

Project Lead: Paul Lukacs

Executive Sponsor: Scott Whittenburg

Actions taken and progress

- Conducted a comprehensive review of graduate recruitment practices across campus by meeting with graduate program leaders, analyzing enrollment trends, and benchmarking recruitment approaches at peer institutions to establish a foundation for a coordinated enrollment strategy.
- Evaluated graduate recruitment and student support resources, including teaching assistantships, fellowships, tuition discounting, scholarships, and revenue generation, and implemented strategic updates to improve resource allocation and enrollment management.
- Enhanced graduate recruitment efforts by redesigning the Graduate Fair, expanding social media outreach, and identifying marketing priorities to strengthen visibility and engagement with prospective graduate students.

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: Morgan Hahn, Stacey Eve, and Drew Riley

Executive Sponsor: Leslie Webb

Actions taken and progress

- Successfully implemented *Scholarship Universe*, centralizing scholarship administration through streamlined application processes, automated matching, and improved data management.
- Improved student financial processes by redesigning the federal work-study hiring process, launching electronic Student Forms, and rebuilding key Banner Accounts Receivable functions to reduce manual processing.
- Expanded student access to financial aid by conducting coordinated FAFSA outreach across multiple Montana communities, strengthening regional partnerships, increasing financial aid awareness, and laying the groundwork for an annual FAFSA Week of Action.

Objective 2

Increase students' career readiness through intentionally designed curricular and co-curricular experiences

Expand and deepen alumni, faculty, staff, and community co-curricular 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 through mentorship and industry connections.

Project Leads: LeAnn Layton and Kyle Bocinsky
Executive Sponsor: Brad Goan

Actions taken and progress

- Expanded campus adoption of *Steppingblocks* as a career outcomes and workforce insights platform by delivering presentations, demonstrations, and strategic consultations across campus.
- Campus units continue to identify and apply *Steppingblocks* data to support advising, career-connected learning, academic program conversations, recruitment messaging and alumni engagement strategies, establishing stronger use cases for long-term institutional adoption.
- *Steppingblocks* data continues to support alumni identification for mentoring, panels, classroom engagement, career networking and co-curricular programming, strengthening connections between students, alumni and industry pathways.



Objective 2

Increase students' career readiness through intentionally designed curricular and co-curricular experiences

Continue to work with faculty across disciplines to integrate career readiness into the curriculum and co-curriculum

Project purpose: To embed career readiness in academic curricula so that students connect learning to future opportunities and departments can measure and enhance impact.

Project Leads: Andrea Vernon and Jennifer Thomsen
Executive Sponsor: John DeBoer

Actions taken and progress

- Completed first year of General Education rolling review with career readiness competencies integrated.
- Career Champions program fully launched. There are close to 250 Career Champions on campus at the close of this school year.
- Faculty Fellows and the Summer Institute for Career Readiness Curricular Integration were both highly successful with new people joining this work and supporting continued efforts to scale career readiness on campus.
- Our career readiness programming, *ElevateU*, received national attention this year with publications in Inside Higher Ed, the Chronicle of Higher Education, and upcoming publications with EAB and *uConnect*.

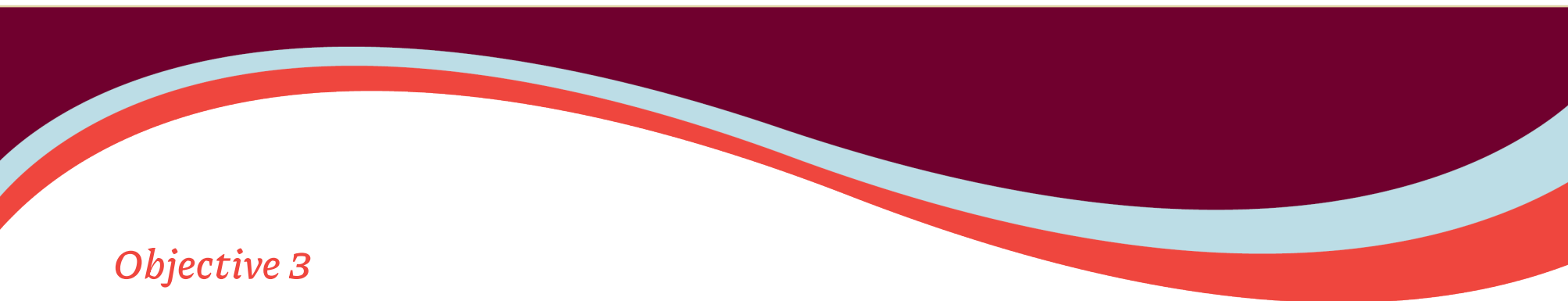
Adapt the academic program portfolio review process with a lens on curricular relevance

Project purpose: To align academic programs with evolving student and societal needs so that programs remain forward-facing, mission-aligned, and strategically sustainable.

Project Leads: John DeBoer and Marc Hendrix
Executive Sponsor: Adrea Lawrence

Actions taken and progress

- Refined the University's approach to evaluating academic program value by shifting the project's focus from Academic Portfolio Review to the seven-year Academic Program Review process.
- Developed a conceptual framework for incorporating program relevance and value into academic program review, using external indicators such as labor market demand, workforce needs, licensure pathways, and student outcomes rather than relying on a single scoring rubric.
- Launched the 2026–27 Academic Program Review cycle for nine academic programs and distributed institutional data, labor market analyses, and program-level metrics to academic leaders, establishing the data infrastructure needed to support future program evaluation.



Objective 3

Prioritize wellbeing, leadership, service, and civic engagement as critical components of the UM student journey

Create a model for student wellbeing that is coordinated and aligned across the programmatic agencies on campus

Project purpose: To align co- and extra-curricular programming agencies so that we deliver a vibrant campus life.

Project Lead: John Nugent
Executive Sponsor: Leslie Webb

Actions taken and progress

- Completed a comprehensive inventory and gap analysis of student-facing programs and services by engaging campus partners, student groups, and Student Affairs units to identify strengths, opportunities, and priorities for a more coordinated student experience.
- Developed draft learning outcomes and core elements for a University-wide student experience framework aligned with *The Montana Way*, providing a foundation for integrating wellbeing, leadership, belonging, and student engagement across campus.
- Strengthened collaboration across Student Affairs by establishing the Student Involvement Coordinating Group, improving alignment among Housing and Residential Experience, the University Center, New Student Success, and related student engagement initiatives.

Build capacity to establish and sustain a cross-campus effort to model civil dialogue, practice civic and democratic engagement, and promote leadership development

Project purpose: To secure funding for student leadership development and civic engagement so that we elevate UM's role in developing active, community-driven citizens.

Project Leads: Michael Rohd, Megan Stark, Gillian Glaes, and Liz Barrs
Executive Sponsor: Kelly Webster

Actions taken and progress

- Hosted Democracy Summit on April 14 with a program of 46 presentations from diverse campus, off-campus, and student entities. Community member attendance was strong, but participation from faculty and students did not meet expectations.
- Spoke to stakeholders all across campus about how academic units and campus programs think about and work around both leadership and civic dialogue and civic engagement.

Objective 3

Prioritize wellbeing, leadership, service, and civic engagement as critical components of the UM student journey

Develop and test an explanatory framework that describes our holistic approach to undergraduate education

Project purpose: To develop an explanatory framework so that we clearly articulate the value of a UM undergraduate education and more intentionally design the student experience.

Project Leads: Jenny Lavey and Drew Riley

Executive Sponsor: Jenny Petty

Actions taken and progress

- Developed and launched *The Montana Way* as the University's signature framework for articulating the value of a UM undergraduate education, integrating career readiness, wellbeing, leadership, service, and civic engagement.
- Created and deployed a comprehensive suite of admissions and marketing materials—including print, digital, video, web, and paid media content—that incorporated The Montana Way across recruitment, executive communications, and statewide outreach.
- Strengthened institutional messaging by developing a shared messaging architecture, training admissions and campus partners, creating communications resources, and establishing a SharePoint site to support consistent use of the framework across the University.



Objective 4

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

Establish UM as the regional leader in online education, including the development of a structure to maintain academic integrity in a digital age

Project purpose: To establish UM as a regional leader in online education for current and future students so that we broaden access to flexible, high-quality academic programs.

Project Leads: Eric Vorkoeper and Sarah Benedict
Executive Sponsor: Shara Tscheulin

Actions taken and progress

- Expanded UM's online education portfolio through extensive market research, stakeholder engagement, and collaboration with academic leaders.
- Advanced academic integrity in online learning by evaluating identity verification and proctoring solutions, consulting with legal, compliance, information technology, and faculty stakeholders, and developing recommendations that informed a decentralized institutional approach to proctoring while continuing work on identity verification.
- Enhanced accessibility of online learning by launching institution-wide training, creating the *Paws for Accessibility Challenge*, expanding faculty support resources, and developing processes to improve compliance with ADA Title II and WCAG accessibility standards across digital course materials.

Develop a comprehensive and financially sustainable noncredit training portfolio

Project purpose: To develop a sustainable noncredit training portfolio for diverse learners so that we expand access, meet workforce needs, increase revenue, and strengthen community engagement.

Project Leads: Tom Gallagher and Julie Cahill
Executive Sponsor: Shara Tscheulin

Actions taken and progress

- Successfully implemented *CampusCE* and fully integrated it with Banner, creating the University's first centralized student information system for noncredit programs and enabling noncredit learners to receive UM IDs, NetIDs, and institutional tracking.
- Expanded campus participation in noncredit programming by creating collaborative administrative structures for Missoula College, Bitterroot College, and the Youth Safety & Compliance Office, enabling additional units to manage programs and enroll learners through the new system.
- Advanced statewide leadership in workforce education by helping develop a shared taxonomy and data framework for noncredit education, presenting recommendations to the Montana University System Board of Regents, and strengthening pathways through the hiring and onboarding of a Credit for Prior Learning (CPL) Navigator.

Objective 4

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

Improve access to academic pathways and strengthen partnerships and industry collaborations

Project purpose: To increase access to academic pathways and strengthen industry partnerships so that we support students' career success and build a strong talent pipeline.

Project Leads: Grace Gardner and Julie Cahill
Executive Sponsor: Shara Tscheulin

Actions taken and progress

- Expanded regional dual enrollment partnerships by launching and advancing academic pathways with Big Sky and Hamilton high schools, while developing additional pathways at Corvallis, Frenchtown, Sentinel, Darby, Victor, Florence, and Stevensville.
- Developed new certificates in Technical Skills in Welding Basics and Building Construction Basics, specifically designed for high school learners. The initiative strengthened regional alignment between K–12 and postsecondary partners while creating clearer academic and workforce pathways for students.
- Expanded collaboration with Jobs for Montana Graduates programming. The initiative strengthened regional alignment between K–12 and postsecondary partners while creating clearer academic and workforce pathways for students.

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

Project purpose: To adapt UM systems for diverse learners so that all students experience a streamlined and supportive educational journey.

Project Leads: Julie Cahill and Brad Goan
Executive Sponsor: Shara Tscheulin

Actions taken and progress

- Successfully launched the Credit for Prior Learning (CPL) initiative by hiring and onboarding a dedicated CPL Navigator, creating supporting resources and processes, and establishing a campus-wide framework that has connected with dozens of students and awarded more than 120 academic credits through prior learning.
- Developed and implemented foundational systems to support CPL, including a dedicated website, advising materials, process maps, articulation resources, and extensive outreach to academic officers, advisors, department chairs, admissions, and evaluation staff to increase campus awareness and adoption.
- Improved enrollment communications for broader learner populations by designing and implementing new Slate communication workflows for non-degree students while establishing frameworks for post-baccalaureate and international student communications.

Objective 5

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

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 coalition building across the State's mental and behavioral health workforce.

Project Leads: Michael Rohd and Amanda Cahill

Executive Sponsor: Brad Goan

Actions taken and progress

- Strengthened cross-campus collaboration by establishing a behavioral health network that brought together faculty, staff, researchers, and community partners for a series of five topical meetings focused on expanding workforce capacity, improving services, and advancing coordinated behavioral health initiatives.
- Increased institutional awareness of behavioral health efforts by creating a comprehensive map of the University's behavioral health activities across Montana.
- Fostered new interdisciplinary partnerships by providing a regular forum for discussion on behavioral health priorities, leading to collaborative grant proposals and stronger coordination around major initiatives such as Resolve, the Rural Health Training Program (RHTP), and State of Mind.

Develop an engagement strategy with state, federal, and private partners to enhance UM excellence in key research areas: AI/machine learning, human performance, cyber, biotech, health outcomes, forest and fire management, water prediction and management, and autonomous systems

Project purpose: To match UM strengths with immediate funding opportunities and urgent needs so that we support collaboration between researchers and external partners to positively impact local, regional, and global communities.

Project Leads: Lily Apedaile, Drew Reinert, and Paul Lukacs

Executive Sponsor: Scott Whittenburg

Actions taken and progress

- Established a cross-functional Government Relations Team to coordinate UM's engagement with state, federal, and private funding partners.
- Strengthened relationships with Montana's congressional delegation and key federal partners through coordinated virtual and in-person meetings in Washington, D.C.
- Identified faculty with established funding relationships and convened research engagement discussions to better leverage existing expertise and strengthen institutional coordination.

Objective 5

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

Leverage the UM Impact and Interfolio platforms to support faculty collaboration and showcase faculty scholarly and creative activities

Project purpose: To capture and showcase research and creative scholarship activities so that we facilitate faculty connections across disciplines and amplify our impact in Montana and across the globe.

Project Leads: Lauren Fritzsche, Josh Groomer, and Wendy Walker
Executive Sponsor: Scott Whittenburg

Actions taken and progress

- Advanced integration of the *UM Impact* and *Interfolio* platforms by developing data workflows, strengthening coordination among Academic Affairs, Research, HR, IT, and vendor partners.
- Expanded faculty and leadership awareness of *UM Impact* and *Interfolio* by presenting to deans, department heads, academic leadership groups, and new faculty, while integrating platform information into university newsletters, websites, and faculty support resources.
- Improved the quality of faculty information in *UM Impact* by coordinating with the Provost's Office to update foundational faculty records, manually adding new faculty profiles, and expanding outreach to academic units across multiple colleges.

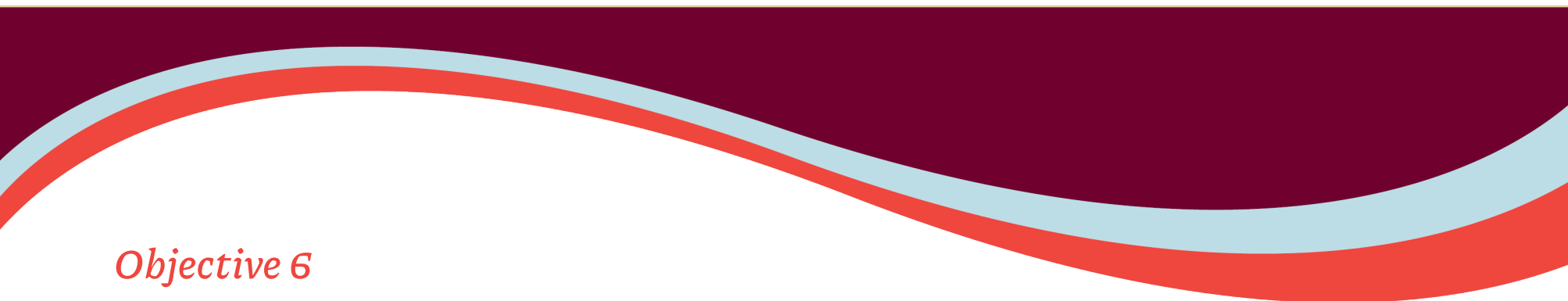
Improve research support systems, processes, and services

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

Project Leads: Katherine Swan and Nicole Thompson
Executive Sponsor: Scott Whittenburg

Actions taken and progress

- Developed process maps for four core processes—including pre-award proposal development, award review and execution, award setup, and subaward setup—to identify bottlenecks, improve consistency, and develop an implementation framework for process improvements.
- Engaged Office of Sponsored Programs staff in a series of workshops to clarify service expectations, develop shared workplace principles, strengthen cross-unit relationships, and build a more cohesive and supportive organizational culture.
- Expanded support and engagement for principal investigators (PIs) and departmental research administrators (DRAs) through networking breakfasts, open forums, Research Coffee Hours, targeted training, and enhanced participation in ORCS communications.



Objective 6

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

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

Project purpose: To expand UM's network of storytellers and brand champions so that we deepen affinity and confidence in UM's impact across Montana.

Project Leads: Dave Kuntz and LeAnn Layton

Executive Sponsor: Kelly Webster

Actions taken and progress

- Implemented a coordinated statewide engagement strategy by conducting outreach in priority Montana communities, establishing a repeatable model that combines presidential roundtables, community conversations, K–12 engagement, alumni events, media outreach, legislative meetings, and donor engagement.
- Expanded collaboration across UM by engaging deans, Athletics, Enrollment, Alumni, and other campus leaders as ambassadors.
- Increased UM's visibility and statewide presence through sustained alumni programming, affinity events, storytelling, and coordinated communications that highlighted student success, workforce impact, and UM's contributions across Montana.

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

Project purpose: To expand, coordinate, and maximize UM's arts and athletics offerings and facilities so that we strengthen community engagement and vitality, foster economic growth, grow revenue, and enhance UM's reputation.

Project Leads: Paula Short, Jim Smart, and Tia Meegan

Executive Sponsor: Kent Haslam

Actions taken and progress

- Centered UM more prominently in the entertainment ecosystem with relationships with promoters, artists, other venues in the region and the labor infrastructure to be able to execute large productions.
- Developed better understanding of the unique challenges of using smaller campus venues as a source of revenue generation through ticketed events.
- Completed safety and security planning for Washington Grizzly Stadium, Adams Center, and smaller venues across campus.

Objective 6

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

Enhance giving among UM alumni, expand the UM network of non-alumni donors, and launch a parents giving program

Project purpose: To deepen fundraising engagement with key stakeholders so that overall philanthropic support of UM grows.

Project Leads: Mandy Brooks, Joellen Shannon, and LeAnn Layton
Executive Sponsor: Cindy Williams

Actions taken and progress

- Strengthened the University's advancement infrastructure by aligning alumni giving strategies through regular UM–UM Foundation collaboration, launching the GiveCampus online giving platform, and modernizing the donor experience across primary online fundraising channels.
- Expanded philanthropic engagement by launching a new Parent and Family Giving Program, establishing a Parent and Family Council, reaching approximately 14,000 families through targeted communications, and integrating parent giving into long-term fundraising strategies.
- Diversified and grew the donor pipeline by deploying approximately 300,000 fundraising solicitations, expanding cultivation of non-alumni donors through strategic outreach and campus events.



Objective 7

Enhance the employee experience and improve employee retention

Implement a revamped performance development process and software system

Project purpose: To implement a performance management system for employees so that they receive meaningful feedback and support for growth.

Project Lead: Shawn Blair

Executive Sponsor: Jay Stephens

Actions taken and progress

- Prepared UM for the FY27 launch of NeoED Perform by completing a successful pilot program, developing customized performance evaluation templates for executive, supervisory, and staff roles, and establishing a modern, institution-wide performance management framework.
- Shifted performance management toward a continuous employee development model by creating evaluation tools that emphasize ongoing feedback, goal setting, professional growth, and consistent institutional benchmarks while allowing targeted customization for specialized employee groups.
- Developed a comprehensive implementation and support strategy that includes department-based training, user guides, ongoing technical support, and professional development resources using feedback from pilot participants to refine the system and prepare for successful campus-wide adoption.

Implement a new employee learning management system and work with campus partners to build trainings

Project purpose: To implement an employee learning management system and create custom training so that employees have access to training they need to succeed.

Project Lead: Jasmine Laine

Executive Sponsor: Jay Stephens

Actions taken and progress

- Successfully launched *NEOED Learn* as the University's centralized employee learning management system, creating a sustainable platform for delivering, assigning, tracking, and managing required and professional development training across UM, Helena College, and UM Western.
- Developed and implemented five required employee training courses—including Cybersecurity, FERPA, Digital Accessibility (ADA), Harassment and Discrimination Prevention/Mandatory Reporting, and Indian Education for All (IEFA)—with automated enrollment, recurring assignment schedules, and compliance tracking for new and current employees.
- Expanded UM's employee training library by collaborating with subject matter experts to develop additional courses.

Objective 7

Enhance the employee experience and improve employee retention

Identify, prioritize and begin to address internal processes that need improvement and that most impact the employee experience

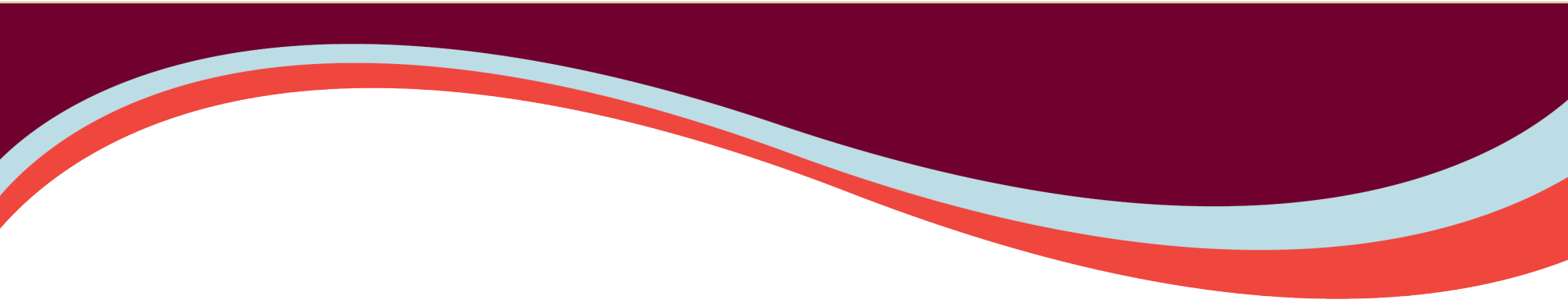
Project purpose: To improve cumbersome processes for campus employees so that we reduce bureaucracy and focus on meaningful, value-added work.

Project Lead: Pamela Altmaier
Executive Sponsor: Jay Stephens

Actions taken and progress

- Conducted a campus-wide assessment of administrative processes by surveying employees, facilitating listening sessions and focus groups, and engaging more than 140 participants to identify the processes that most significantly affect the employee experience.
- Identified and prioritized high-impact opportunities for improvement, selecting three major processes for redesign—Hiring and Recruitment, Pre-Boarding, and Travel and Reimbursement.
- Partnered with process owners and campus leaders to map employee journeys, identify key pain points, and develop redesign strategies that align with existing improvement efforts, technology initiatives, and organizational priorities rather than duplicating work already underway.

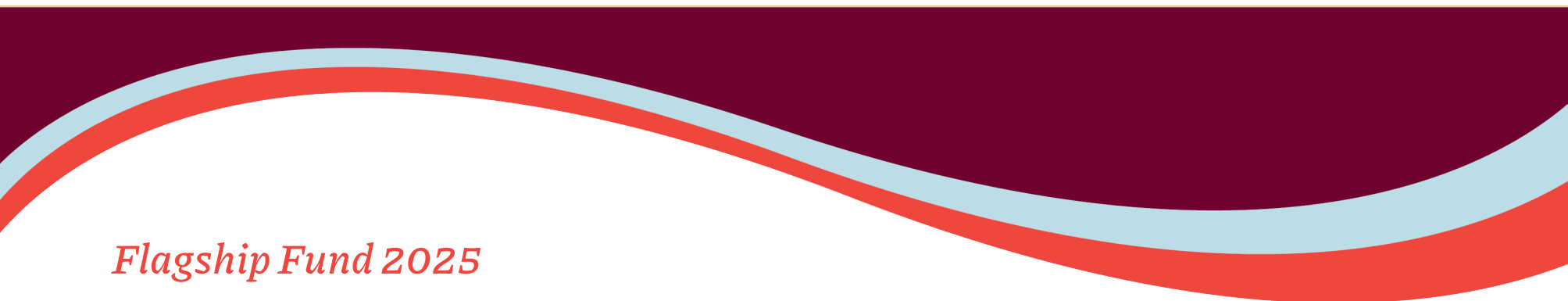




Flagship Fund

The Flagship Fund was created to spur innovation by surfacing and investing in ideas from UM faculty and staff. Its origins lie in UM's Strategic Enrollment Planning (SEP) process executed in 2021-22. SEP investments included 10 new or enhanced academic program strategies, two co-curricular strategies, and four recruitment and retention strategies. To date, those investments have accounted for 533 new UM students.

Flagship Fund investments have been more modest, providing one-year funding for a small number of exploratory projects each year. The following pages highlight some of those projects and includes success stories from the Flagship Fund and SEP processes.



Flagship Fund 2025

The call for proposals for 2025 Flagship Funds focused on fostering the development of sophisticated and adaptable thinkers capable of asking enduring questions, of civic-minded problem solvers who strengthen our social fabric, and of service-oriented leaders who shape the future of our state and nation. Seven projects were funded for FY26.

Obit Podcast

Mary Auld, Project Lead

Proposal: “Obit” is a collaboration between the University of Montana School of Journalism, Montana Media Lab, host Jule Banville, and Radiolab founder Jad Abumrad. The 10-episode series explores the art of the obituary, blending universal themes of death, life, and journalism while sharing stories of diverse Montanans. UM students gain hands-on experience producing audio obituaries, working alongside professionals to develop storytelling skills. Ultimately, this project enriches the conversation around an often taboo topic and highlights UM’s commitment to experiential, innovative media education.

Immersive Science Communications Professional Development Program

Proposal: Recognizing the urgent need to counter misinformation, this pilot program trains UM faculty and graduate students in effective science storytelling and media engagement. Participants attend an intensive two-day workshop, followed by a six-month support period for applying new communication skills to real-world science outreach. After that, a follow-up one-day session fosters knowledge exchange and lessons learned. By leveraging UM’s strengths in journalism, marketing, and the sciences, the program aims to establish the university as a leader in strategic, trustworthy science communication.

Report for Montana

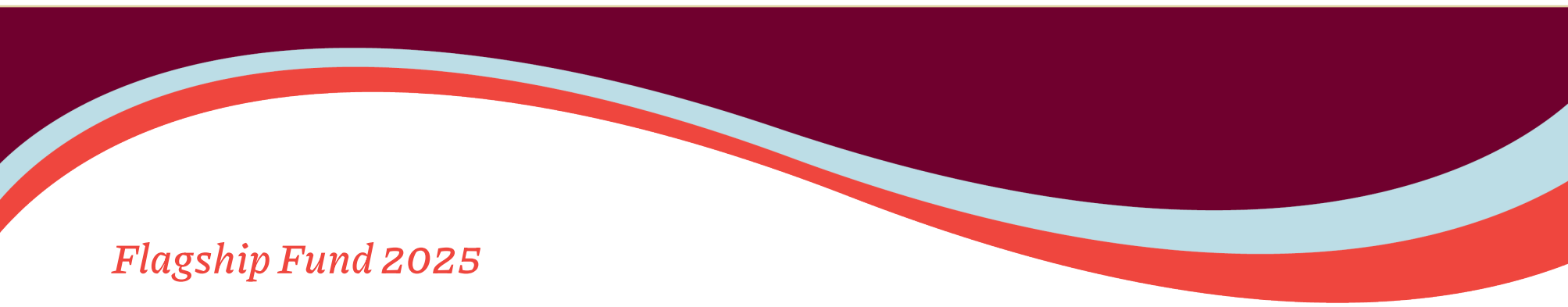
Lee Banville, Project Lead

Proposal: *Report for Montana* is a new UM School of Journalism course that sends students into small Montana communities to learn the operational realities of community journalism. Participants explore both editorial decision-making and business management at local newspapers and radio stations, seeing firsthand the value and sustainability of hyper-local reporting. By shadowing professionals, they gain practical experience while also investigating how local media outlets shape civic discourse. The course aims to nurture the next generation of community-oriented news leaders who uphold journalistic excellence across Montana.

Strengthening Democracy: How U.S. Federal Indian Law has Influenced Conceptions of Tribal Sovereignty

Jeff Stephenson, Project Lead

Proposal: This single-day pilot event in Fall 2025 engages about 20 Native American high school students in exploring the legal concept of tribal sovereignty. Through two lectures—one by UM faculty in Native American Studies and another by a specialized attorney—students analyze key readings on sovereignty and “domestic dependent nations.”



Flagship Fund 2025

Workshop sessions encourage participants to apply these legal concepts to real-life experiences and envision future policy changes. By boosting awareness of civic and tribal engagement, the program also provides a welcoming introduction to UM, potentially increasing Indigenous enrollment. If successful, the plan is to expand into a multi-day summer workshop that reaches students across Montana reservations.

The Big Event

Devin Carpenter, Project Lead

Proposal: The Big Event is an inaugural student-led service day at the University of Montana, designed to bolster student-community connections and boost retention. Inspired by Texas A&M's successful model, it will mobilize hundreds of students to support local residents, nonprofits, and businesses through tasks like yard work and minor repairs. This large-scale event serves as a “bookend” to a student's first year, echoing the values introduced in the Big Sky Experience. It offers hands-on leadership and teamwork practice while contributing tangible benefits to the Missoula community.

Yes, Our Libraries are Open

Megan Stark, Project Lead

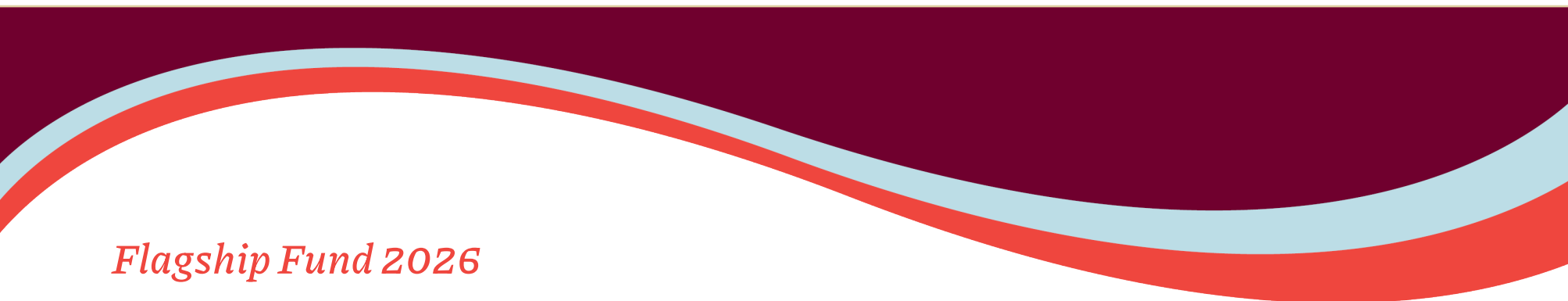
Proposal: In Missoula, two strong library systems—Missoula Public Library and UM's Mansfield Library—plan to collaborate in promoting Open Access (OA) to scholarly resources. By hosting 6–8 community workshops during global Open Access celebrations, they'll introduce

local officials, nonprofits, and the public to OA materials and best practices. This collaboration addresses challenges posed by AI-driven misinformation and information “echo chambers,” highlighting libraries' vital role in bridging knowledge gaps. Participants learn to find, evaluate, and ethically use open-access content, promoting civic literacy and inclusive knowledge sharing. Ultimately, the project exemplifies how libraries can be community hubs for learning and engagement.

Uplifting Communities and Empowering Future Leaders: UM's Alternative Breaks Program

Karey Sabol, Project Lead

Proposal: UM's Alternative Breaks immerses student cohorts in service-learning trips, addressing issues from homelessness to environmental restoration. Each trip offers about a week of hands-on service, contributing hundreds of volunteer hours and fostering personal growth in critical thinking and civic engagement. Demand for these trips is high, prompting a request to expand from two trips to three and to keep participation costs low. The program also plans to add faculty advisors and deeper community partner collaborations, enriching the educational impact. By building lasting ties between student volunteers and community organizations, the initiative promotes ongoing service and a culture of civic responsibility.



Flagship Fund 2026

The call for proposals for 2026 Flagship Funds focused on promoting wellbeing and healthy relationships, components of *The Montana Way*, UM's holistic approach to education. *The Montana Way* fuses academic excellence and career preparation with a deep commitment to human development, civic responsibility, and purposeful living. It reflects a bold, integrated approach to preparing students not just for careers, but for lives marked by wellbeing, healthy relationships, leadership, and service. Four projects were funded for FY27.

Wellbeing Through Cultural Arts and Traditional Practices

Brian Reed, Project Lead

Wellbeing Through Cultural Arts and Traditional Practices will offer weekly opportunities to participate in Indigenous arts and cultural practices facilitated by Indigenous artists, elders and culture bearers. Open to the campus community, the program will use making, storytelling and cultural connection to foster belonging and holistic wellbeing.

Veteran Wellness Coach Program

Patrick Beckwith, Project Lead

The **Veteran Wellness Coach Program** will support a lead veteran wellness coach who will provide peer-based wellbeing support to UM student veterans and service members, building upon a successful pilot launched during the 2025-26 academic year.

Soft Monuments: Textiles as a Tool for Community Wellbeing

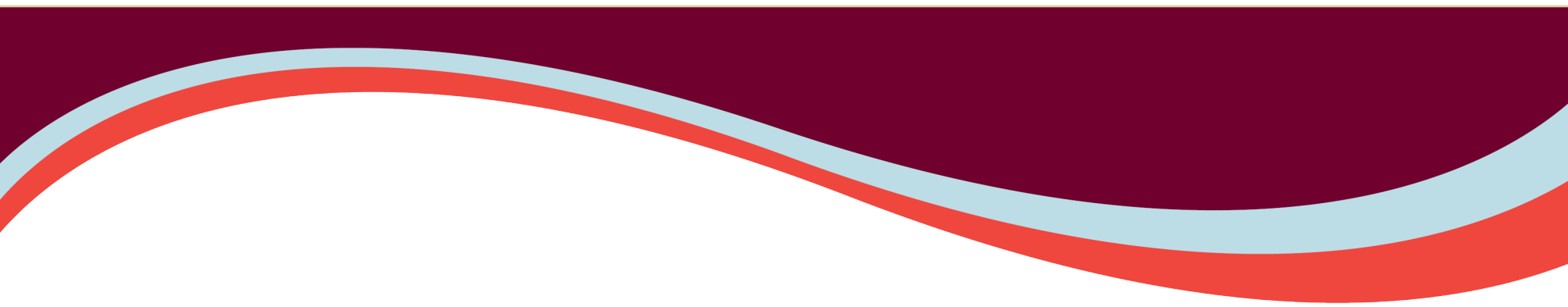
Jennifer Comb, Project Lead

Soft Monuments: Textiles as a Tool for Community Wellbeing will bring UM and the broader community together to create large-scale public artworks from recycled textiles. Built around visiting artist Amanda Browder's fall residency, the project will use collaborative artmaking to foster creativity, connection and community wellbeing.

Be Here with Brick

Erinn Guzik, Project Lead

Be Here with Brick will explore a novel approach to helping students build healthier relationships with their smartphones. Communal "Brick" devices placed around campus will allow students to temporarily block distracting apps and create intentional phone-free periods, with the goal of improving focus, sleep, wellbeing and in-person connection.



Alignment: Sector and Unit-level Strategy

UM's Annual Playbook represents a fraction of the strategic initiatives the University pursues in a given year. Strategic alignment is about ensuring that all parts of the institution—academic programs, administrative units, support services, and leadership—are working in concert toward a shared purpose and institutional objectives.

One way alignment is achieved is through sector and unit-level strategy. This section highlights sector and unit-level activity in support of University objectives over the past year.

Alignment: Sector and Unit-level Strategy

At a May 2026 University Leadership Council retreat, campus leaders identified 370 actions or achievements that align with and support University strategic objectives. Here are a few of the successes from across campus.

Objective 1: Improve student recruitment, access, retention, persistence, and completion

- UM mapped the entire curriculum for work-based skills and competencies, a university-scale undertaking that connects persistence/completion with the value of the degree.
- Admissions completed implementation of Slate CRM, producing more accurate and consistent recruitment data and improving UM's ability to make data-informed decisions.
- The School of Social Work's 2+2 distance program graduated more than 40 students who will work across Montana, a strong access-and-workforce story.
- Physical Therapy achieved 100% retention, 100% licensure exam passage, and 100% employment.
- TRIO Upward Bound expanded to Heart Butte High School on the Blackfeet Reservation, extending UM's college-access reach.
- A cross-sector "Ghost Student" remediation effort saved UM \$2.1 million.
- World Languages and Cultures hosted approximately 200 high school students and their teachers for its annual World Languages Day.
- High school journalism day brings several hundred high school journalism students to campus each spring.
- UM implemented a dedicated retention intervention through Navigate, alongside a "no wrong door" warm-handoff approach to connecting students with support.
- UM increased scholarship support and modernized scholarship delivery, including Scholarship Universe, streamlined incoming offers, and an increased scholarship budget for AY26–27.
- The Graduate School collaborated with New Student Success to launch a graduate student orientation.



Alignment: Sector and Unit-level Strategy

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Objective 2: Increase students' career readiness through intentionally designed curricular and co-curricular experiences

- Experiential Learning and Career Success (ELCS) secured a \$1 million philanthropic gift for Elevate U and student career readiness.
- ELCS enrolled 250 Career Champions across campus, creating a distributed network of people supporting students' career preparation.
- Career-readiness competencies are now being embedded into General Education, moving career preparation from an optional service toward the core curriculum.
- UMCUR reached its highest participation ever—160-plus presentations involving more than 220 students.
- The Law School ranked 14th nationally for federal clerkship placements, a striking external indicator of graduate career success.
- Physical Therapy reported 100% employment after graduation, with many graduates receiving multiple offers, supported by a network of 700+ clinical experience sites.
- ELCS trained 10 faculty fellows in intensive curricular integration of career readiness, building faculty capacity rather than treating career development as a stand-alone service.
- UM expanded Virtual Exchange/ Collaborative Online International Learning and was recognized as a Center of Excellence, adding an international dimension to students' preparation.
- Sociology and Criminology combine internships, the FBI Collegiate Academy, and the Criminology Club to prepare students for careers.
- Students are doing consulting projects for real organizations and solving real-world problems, a particularly direct form of applied career preparation.

Alignment: Sector and Unit-level Strategy

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Objective 3: Prioritize wellbeing, leadership, service, and civic engagement as critical components of the UM student journey

- VolunteerUM engaged 464 students in 2,816 hours of service across 34 projects benefiting 42 nonprofit organizations.
- The Iron Griz garden harvested more than 5,000 pounds of produce for use on campus, combining student involvement, sustainability, food systems, and wellbeing.
- Experiential Learning and Career Success (ELCS) ran three Alternative Spring Breaks involving 33 students in intensive week-long service learning.
- The Counseling Department expanded access to free counseling through its counselor training center, benefiting both students-in-training and people needing services.
- UM launched a veteran support coach position through the Wellness Center, providing targeted wellbeing support for student veterans.
- Student veterans established a Project Healing Waters chapter, connecting wellbeing, belonging, and student leadership.
- Ten students were hired and trained as Zero Waste Ambassadors, providing a student leadership role tied to campus sustainability.
- Journalism students cover elections for local outlets and travel to Helena to cover the Legislature, an unusually authentic civic-learning experience.
- The peer-mentor program was revitalized, strengthening peer-to-peer student support and belonging.
- Admissions revamped its prospective student information sessions to promote “The Montana Way.”
- UM strengthened its “culture of care” through wellbeing coaches, a wellbeing advisory group, and no-wrong-door/warm-handoff practices.
- Office of Disability Equity (ODE) redesigned commencement accessibility through preview opportunities, serving more than 50 participants and receiving strong positive feedback.

Alignment: Sector and Unit-level Strategy

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Objective 4: Establish UM as a platform for learning to serve the needs of a wider range of learners

- Credit for Prior Learning was advanced, potentially shortening and lowering the cost of degree pathways for adult and experienced learners.
- A new badging policy and procedures were established, providing infrastructure for shorter-form credentials.
- UM continued developing new and redesigned online courses, concentrating on new programs and high-demand courses.
- The pathway from Missoula College's AA in Public Health was streamlined, another concrete example of making UM more permeable to transfer learners.
- Two accessibility tools were implemented in Canvas to identify and remediate digital accessibility problems.
- Open-access course materials continue to be coordinated and supported to reduce student costs.
- A professional master's is being explored specifically for nontraditional students, suggesting a deliberate shift toward new learner markets.
- UM moved part of its Learning and Employment Record effort onto campus, building infrastructure for documenting learning beyond conventional transcripts.
- UM is developing a Montana Certified Public Manager program for a Fall 2026 launch, extending university learning to public-sector professionals.
- A 2+2 Elementary and Special Education program was developed with four community colleges, creating a significant distributed-access pathway.
- UM established an online master's in School Counseling with limited on-site requirements, opening a graduate professional program to geographically dispersed learners.
- UM signed a 2+2 agreement for the BS in Public Health with Helena College.



Alignment: Sector and Unit-level Strategy

At a May 2026 University Leadership Council retreat, campus leaders identified 370 actions or achievements that align with and support University strategic objectives. Here are a few of the successes from across campus.

Objective 5: Build partnerships and leverage research and economic development initiatives in response to community, state, and global needs

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| <ul style="list-style-type: none">• UM created a student-led Cybersecurity Security Operations Center with CyberMontana that supports communities across the state, combining student learning, workforce development, and public service.• Forty students produced implementable forest-management plans for 300 acres of The Nature Conservancy land, a strong example of applied learning generating tangible community/environmental value.• Sociology and Criminology research is helping inform criminal-justice policy at local, state, and national levels. | <ul style="list-style-type: none">• UM enrolled in APLU's Innovation and Economic Prosperity designation process, creating a framework for demonstrating and strengthening its economic-development impact.• A major archaeological research grant supports an international hunter-gatherer research network involving two postdocs and two PhD students.• UM partnered with Rocky Mountain Research Station scientists to host the North American Forest Ecology Workshop—and the conference exceeded capacity. | <ul style="list-style-type: none">• UM hosted a Conference on Indigenous Science and Language, an important intersection of research, community partnership, and Indigenous knowledge.• QUEST worked on Big Sky Rail and is re-establishing a partnership with the City, demonstrating applied university capacity directed toward regional issues.• UM and the U.S. Forest Service developed personnel-sharing agreements to sustain the workforce during difficult periods, an interesting model of university-agency partnership. |
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Alignment: Sector and Unit-level Strategy

At a May 2026 University Leadership Council retreat, campus leaders identified 370 actions or achievements that align with and support University strategic objectives. Here are a few of the successes from across campus.

Objective 6: Broaden UM's engagement with alumni, donors, and community members

- The Big Give generated more than \$425,000 from 680+ donors in 24 hours, benefiting 50 campus programs.
- Montana Public Radio and Montana PBS extend UM's educational mission across Montana and beyond 24/7/365, arguably UM's broadest continuous community-engagement platform.
- UM's biodiversity research collections launched public exhibits at Missoula Airport and the Public Library, bringing university research into highly visible community spaces.
- UM democracy programming reached 1,000+ middle- and high-school students and their teachers across Montana, working with community colleges, chambers of commerce, and other local partners.
- A Parent Family Council was established, with explicit goals around community-building, student communication, and philanthropy.
- Three new scholarships were created for military families, alongside a military/veteran reunion developed with alumni.
- SARC student employees built statewide partnerships for the "What Were You Wearing?" exhibition, generating new donors and potential mentors for students.
- The *Griz Owned* initiative expanded, providing another vehicle for connecting UM with alumni and their enterprises.
- The College of Business uses a twice-yearly advisory council to shape curriculum and build corporate pipelines.
- An alumni survey drew 300 responses from 1,000 alumni about program success and academic preparation, a strong response rate and a useful engagement/feedback mechanism.
- UM sold nearly half a million tickets to events, illustrating the scale of the University's role as a community gathering and cultural venue.

Alignment: Sector and Unit-level Strategy

At a May 2026 University Leadership Council retreat, campus leaders identified 370 actions or achievements that align with and support University strategic objectives. Here are a few of the successes from across campus.

Objective 7: Enhance the employee experience and improve employee retention

- UM launched NeoED LEARN, a new employee learning system with required training and content developed by partners across campus, creating university-wide professional-development infrastructure.
- New in-person employee orientation is receiving very high ratings, with participants reporting greater understanding of UM's mission, history, and points of pride.
- UM created multiple ways to recognize employees—including Griz Gratitude, Might of Montana Awards, Share Kindness, and Teams-based praise—to help employees feel valued and recognized.
- Academic Personnel support was strengthened by formalizing the AVP role and adding another People & Culture client partner.
- *Under the M* is becoming a trusted employee/retiree information source across email, web, and Teams, helping strengthen transparency and shared purpose.
- Multiple well-attended leadership and management development sessions were offered to employees, directly addressing supervisor and leadership capability.
- UM held its long-running Summer Teaching Institute focused on pedagogy and evidence-based teaching, investing in faculty development and instructional quality.
- A public Microsoft Teams community was created for employees to exchange information, find common interests, and build workplace belonging.
- UM developed and implemented best practices for non-tenure-track teaching faculty, addressing the experience of an important employee group.

Alignment: Sector and Unit-level Strategy

The Office of Strategic Planning and Implementation (OSPI) supports strategy development and alignment across campus through several types of engagements

Information sessions

Sessions focus on UM's approach to strategy and institutional objectives found in the Annual Playbook. These sessions are designed to support unit alignment with institutional strategy and to help employees connect their work to the vision and mission of the University. Sessions can be customized to meet specific needs or interests.

Consulting

OSPI provides guidance and support for leaders interested in designing strategic planning and implementation processes at the sector or unit level.

Facilitation

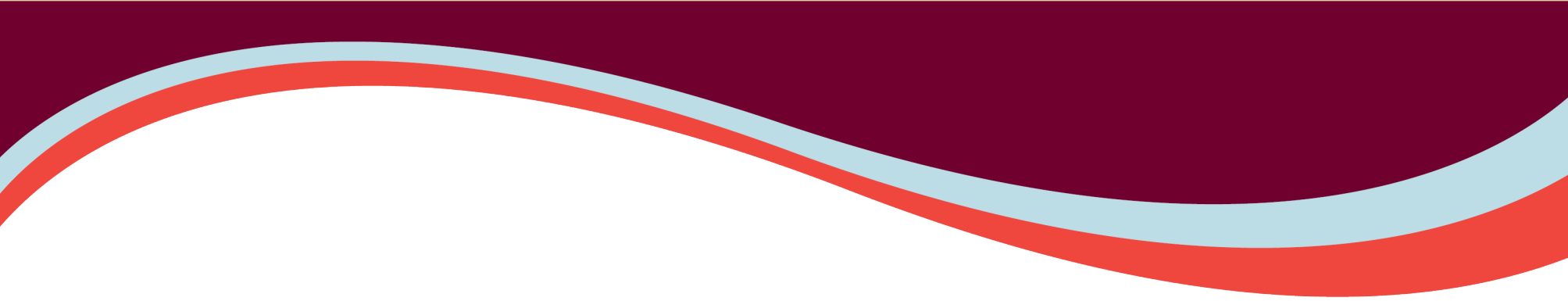
OSPI facilitates sessions that engage employees in strategic thinking, planning, innovation, and problem solving specific to a unit's needs.

Training workshops

Training workshops related to strategic planning, strategic thinking, and organizational change leadership are offered through UM's Office of Organizational Learning and Development (OOLD). Customized training sessions are also an option.

Email strategy@umontana.edu for more information





Looking Ahead

UM's **FY27 Annual Playbook** continues to focus on enrollment, preparing students for prosperous and purposeful lives, expanding UM's offering to a wider range of learners, meeting state and global needs through research and economic development, expanding our networks and partnerships, and making UM a great place to work. Improving core infrastructure, including technology, data, financial compliance and policy, physical infrastructure, and visual identity has been added as an objective for FY27.

While UM renews its strategic playbook annually, many initiatives span multiple years. The FY27 Playbook includes 15 projects that are a continuation from the FY26 Playbook.



Office of Strategic Planning and Implementation

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