



**'Jacket Leadership Team Meeting Minutes
March 10, 2026, 2:00 – 3:30 p.m.**

The 'Jacket Leadership Team promotes shared governance by including a wide representation of departmental leaders in decision-making processes and the enacting of institutional priorities. It aims to enhance the university's mission, improve operational efficiency, and foster a collaborative environment that promotes academic excellence and student success.

Please share all information from today's meeting with the stakeholder group you represent.

INTRODUCTION OF NEW MEMBERS

Chancellor Hicswa introduced Daisy Collins, the new Director of Military and Veterans Success Center.

POLICY

Unallowable and Restricted Expenditures Policy (first reading)

Chancellor Hicswa announced that Cindy Bell, Director of Grants and Sponsored Programs, agreed to lead policy work. Barb Burows, Director of Business Services, provided an overview of the suggested updates made to the Unallowable and Restricted Expenditures Policy, to align its language with the equivalent policy at Montana State University Bozeman. Discussion followed. The policy will have its second reading at the April 14 meeting.

PRESENTATION AND DISCUSSION

Strategic Planning

'Jacket Leadership Team members engaged in the second strategic planning session facilitated by Karen Miller and Michelle Williams of Kaleidoscope Group. The first campus-wide session is scheduled for March 24, at 3:00 pm in Room 119 of the Health Sciences Building at City College, and is open to all faculty, students, and staff.

UPDATES

Sunny Day Real Bird, Director of Native American Achievement Center

The 56th Annual MSU Billings Powwow is April 10–11, welcoming nearly 3,000 guests to campus. We're looking for volunteers — and 3 groups to fundraise by managing admissions (1 Friday, 2 Saturday). Each group will receive 15% of the total admissions collected during their assigned session. If your group is interested, please reach out or contact the Powwow Volunteer Coordinator at (406) 657-2182.

Paul Foster, Executive Director of the Office of International Studies

The Office of International Studies and the Mansfield Center at the University of Montana will co-host a day-long Civics Forum on March 12. This full-day conference is designed to inspire leadership, foster collaboration, and promote civic engagement through interactive learning experiences led by university faculty, staff, and community members. Under the theme "*Strengthening Your Community and the Power of Connection*," participants will gain essential skills and perspectives for active civic engagement and effective community and global leadership. Students will engage with diverse viewpoints, analyze political systems, strengthen their critical thinking abilities, and deepen their understanding of how civic participation shapes

communities and society. We expect up to 250 high school students from Billings and our region to attend the one-day event.

Heather Hanna, Assistant Vice Chancellor of Finance

The Administration and Finance division is holding its semi-annual JACKET SUCCESS / UNIVERSITY EMPLOYEE TRAINING with daily sessions the weeks of March 9th – 12th and March 16th – 19th.

The training is for all faculty and staff, and sessions contain new information as well as updates from each area.

The [schedule](#) includes:

- Budget: Reviewing department budget activity using the Banner Web Reports & reminders for FY27 workbooks
- Business Services:
Two sessions:
 - Updates! Upcoming policy & form changes, get started with SmartBuyMSUB, foreign travel, cash handling procedures, FTC/Red Flag, and fiscal year end (FYE) deadlines
 - Bring your work, open lab. SmartBuyMSU purchases, Chrome River travel help, forms, etc.
- Environmental Health & Safety: Field Level Risk Assessments – An effective way to minimize risks to the health & safety of an organization
- Facilities Services: What you need to know, overview
- Financial Services: New Fixed Asset thresholds, inventory, fiscal year end (FYE) deadlines
- Human Resources: HR updates
- Information Technology: AI – CoPilot Chat training
- Payroll: MyMSUB, EPAFs, timesheets and approvals
- University Police: Response to Active Shooter

To register, go to [Jacket Success - Employee Training](#) and click on the [registration link](#).

Barb Burows, Director of Business Services

Preparation for Fall 2027 Student Fee Change Requests

It's time for departments to begin planning any student fee change requests for Fall 2027. Please work with your respective Vice Chancellor from now through the summer to review potential changes and prepare your proposals.

The formal collection and submission process for fee change requests will begin in late September or early October 2026.

The student fee guidelines—including fee types, timelines, and the full process—are available on the Business Services Tuition page.

https://www.msubillings.edu/intranet/boffice/Fee_Guidelines.htm

Julie Pettitt, Executive Director of Undergraduate Admissions

Key Recruitment Events for Fall 2026

March 12th – [City College Transportation & Industry Expo](#) and University Campus [Civics Forum](#)

March 27th – [Spring Preview Day](#) (Calling any faculty who can support the event!!)

March 31st – BPS 9th Grade Visit (1 of 2) & City College HOSA

April 7-10th – Tribal College Fairs

April 10th – BPS 9th Grade Visit (2 of 2)

April 22nd – [Fall 2026 Registration Sessions](#) begin for new freshman
 July 13-14 – New Student Orientation (RSVP's now open!)
 September 1st – Fall Kickoff 🎉

Fall 2026 Recruitment Efforts Gaining Traction!

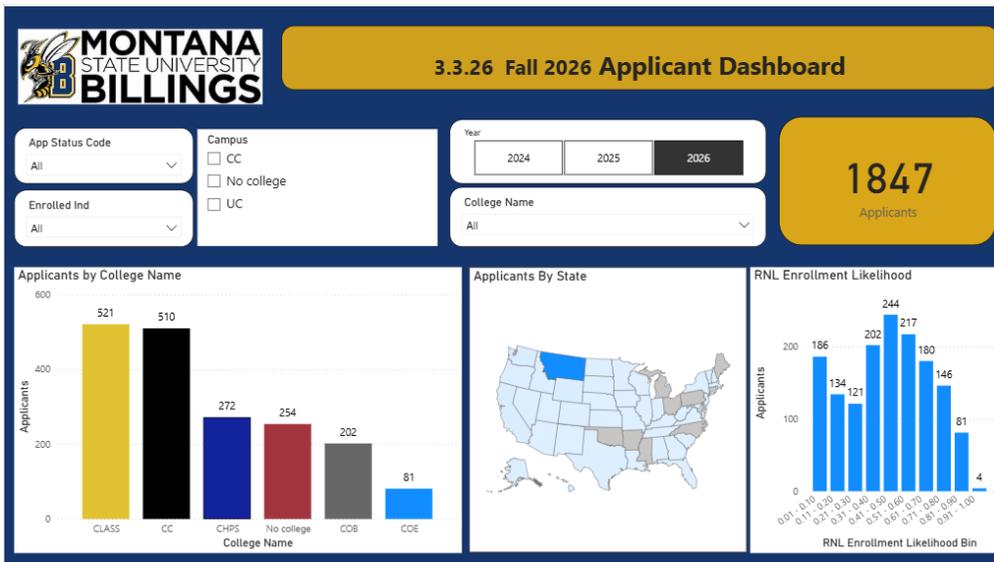
Total applications for Fall 2026 are currently 1847, which is +69 ahead of where we were at this time last year. For comparison, totals at this point in prior years were 1,778 in 2025 and 1,796 in 2024. To help visualize where interest is coming from, a state heat map has been added to the report. Following recent out-of-state travel, we are continuing to focus outreach efforts on WUE states and our strong local pipelines.

By college:

- City College: +38 applications
- CLASS: +46 applications
- CHPS: ↓11 applications
- COB: +4 applications
- COE: Holding steady at 81 applications

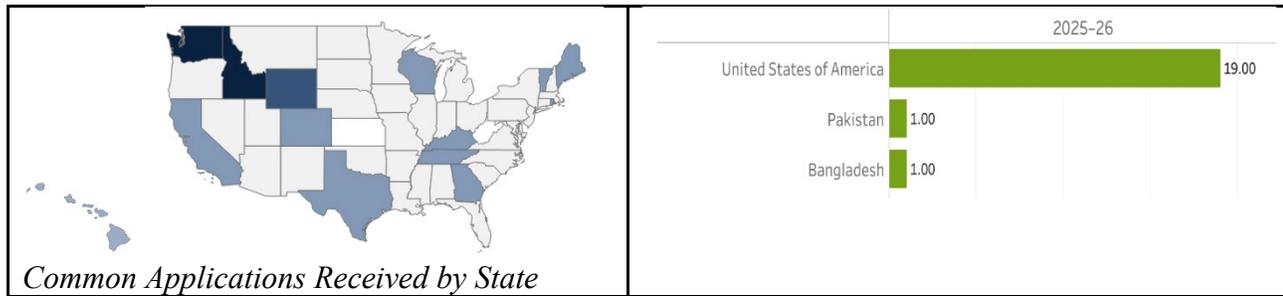
Yield/Enrollment Outlook: The next few months are particularly important for yield. Historically, we receive approximately 600–700 additional applications during this period. While we currently have about 46% of our application goal in the funnel (*we have an ambitious goal of 4k apps for Fall 2026, up from the total 3120 apps received for Fall 2025*), only about 1 in 5 admitted students who apply before January 1 typically enroll/yield. After March 1, both application volume and yield increase significantly, making this period critical to achieving our final headcount. Although these late-cycle applications require additional matriculation effort, they perform exceptionally well, often yielding 1 in every 3.5 applicants, making them an important component of our enrollment strategy.

Every visit, phone call, application, faculty touch point, and registration counts!



Common Application Update: Since launching MSUB’s newest application on February 2nd, called the Common App, we have received 21 completed applications, including two international applicants, along with 31 prospects and 521 new suspects generated through the platform. Adopting the Common App supports MSUB’s strategy to grow out-of-state and transfer enrollment as in-state, first-time student numbers are projected to decline over the next 2–3 years. By joining MSU and UM on the platform, MSUB increases its

visibility to students—particularly in WUE states—and expands its national and potential international recruitment reach.



Jerry Girard, Director of Student Health Services

We are now a GeneSight collection clinic. This means that we gather patient lab samples for genetic testing for the purpose of more effectively matching psychiatric medication to patients. Once the sample is collected by one of our medical providers at Student Health Services, we send the sample to GeneSight and await results within a week. Our medical staff will then work with students on medication management and also work with students to educate them on payment options for this service which is insurance billable.

The National College Health Assessment has closed for 2026. This year, 202 MSUB students responded to the survey which is an increase from the 185 students who responded in 2023. We can expect data from the NCHA by this summer.

SHS will be, once again, collaborating with Vitalant to host a Bloodmobile blood drive at the University Campus on March 31. All students, staff, and faculty will be welcome to sign up and donate. Be on the lookout for promotional materials and sign-up information soon.

There are a couple of HEROES events coming up in March. On the 19th will be *Mocktails and Mario Kart* which is a DUI education event for students and on the 25th is *Eat the Rainbow* which is a nutrition education event for students.

Tracy McLuskie, Director of Disability Support Services

Please see the update below on Disability Support Services (DSS) activity for the current semester:

1. Current number of registered students: 300
2. Total number of appointments conducted with students from 1/14 - 3/5: 44 *
 - City College campus: 10
 - University campus: 23
 - Virtual: 11

*This total includes approximately seven walk-in appointments. The exact number may vary due to a new tracking tool recently enabled in the software, which is still stabilizing appointment data.

3. Total number of Exam Room Bookings in both DSS offices: 132
 - City College campus: 74*
 - University campus: 58

*This total includes MSU Great Falls students who also utilize this office for exam proctoring.

4. Staffing Update

- Mandy Madler will be going on maternity leave this month. Greg and Tracy will take turns covering between each campus office.
- DSS has a student work-study position open for 10/hours a week in our University office. The position is posted on CareerLink, and interested students may also email their resumes to Tracy.

5. Jacket Giving Day – DSS Renovation Project

DSS is seeking funding to soundproof a testing room and nearby offices. A testing room on the university campus lacks proper soundproofing and shares a wall with a public bathroom, creating distractions that impact students, especially those with sensory or cognitive challenges. These renovations will create a quieter, distraction-free testing environment, which is essential for students with approved testing accommodations.

Donating to this project directly supports student success by reducing anxiety and distractions, allowing students with disabilities to focus and perform confidently. This renovation aligns with MSUB's commitment to accessibility, inclusion, and student success, ensuring every student, regardless of need, has the tools and environment necessary to thrive academically.

You can donate at: give.msubillings.edu/jacket-giving-day-2026 or via payroll deduction

Codie Wahrman, Associate Dean of Student Engagement

Housing:

- Our occupancy continues to climb for Fall Applications
- FY27 applications - as of today we have 247 completed applications and 16 started without deposit (108 new students and 155 returners).
 - This week last year we had 193 completed and 10 started without deposit (69 new and 134 returners).
- Current occupancy 323 compared to 277 last year at this time
- New Lighting project in Petro Hall in complete – whole residence hall as automatic LED lights in each floor
- Lots of painting and lobby updates being completed over the next few weeks

CFE:

- New artwork installed in the Rimrock Café' – come check it out!
- New sound system installed in the SUB Atrium
- New projection system going in the Rimrock Café' next week – this will be great for programing and events 😊
- Our favorite time of the year has arrived once again! It's time to take a moment to recognize hard-working student leaders across campus who have made a positive impact in the MSUB Community! You can nominate as many individuals as you please! As a reminder, if you nominate someone or are nominated, that is an automatic invitation to our banquet. A formal invite is to follow the nominations closing.
 - Scan the QR Code below or click on the link to access the nominations form.
 - Click [here](#)
 - You can also access this information on the website found [HERE](#)



●
Amber West Martin, Director of the Academic Support Center

Upcoming Events and Workshops

Friday, March 13th – Pi(e) Day! Feel free to bring a pie and/or your savvy taste for the delectable dessert. 11 – 1!!

Monday, March 23rd – Power Hour with the Schaffers! "True Facts About Fake News: Dissecting Disinformation: Evaluating Information and Sources." Staff, faculty, and students are welcome to ASC room 153 at 3PM!

This spring, 8 new tutors completed their training and achieved College Reading and Learning Association (CRLA) Level 1 certification, and 5 continuing tutors have completed CRLA level 2 certification. The staff also continue their professional development through Safety Trainings, Title IX Training, and Mental Health First Aid.

The ASC and International Studies have partnered to provide Supplemental Instruction (SI) for the Japanese language course. The SI student lead meets twice a week at the ASC to host practice sessions in conversational Japanese, in addition to attending all of the online classes with the students. The ASC looks forward to building more programs to support language instruction.

The ASC Leadership Team has had each of their proposals accepted for the Associations of Colleges for Tutoring and Learning Assistance (ACTLA) Conference in mid-April. Presentations include Lucas Logan and Precious McKenzie "Collaboration as a Catalyst: Practical Strategies for Stronger Campus Ties"

Katie Moffat, the Peer Navigator team, and ASC Graduate Assistant Grace Mock "Decoding the Hidden Curriculum with Data-Driven Peer Navigation"

Lucas Logan and Supplementary Instruction student lead Aubrey Rider " Successful Attendance and Instructional Strategies for First Year Supplemental Instructor"

Amber West Martin and Precious McKenzie will be featured speakers regarding "Assessment and Sustainability: Using Rubrics to Measure Learning and Program Outcomes to Sustain Relevancy in the Academic Landscape"

Katie Moffat, Retention Director

Parenting Student Support Outreach:

- Did you know that we have 190 currently enrolled, self-identified parenting students that we are aware of? This includes undergraduate and graduate students. As a reminder, the primary way that we are able to identify our parenting student population is through self-identification on the Navigate360 Intake Survey. The more we encourage our students to interact with Navigate360, the more accurate our identified parenting student population will become.
- The Student Parent Club will host a fun day at Zoo Montana for parenting students and their families on Monday, April 13 at 10am. All identified parenting students will receive an emailed invite and we'll also be circulating flyers that departments and offices can share with students whom we may not have identified. Any questions can be sent to Katie at katharine.moffat@msubillings.edu.

205.0	Unallowable and Restricted Expenditures
Subject	Accounts Payable
Revised	12/2025
Effective Date	03/2013
Review Date/s:	02/2026
Responsible Party	Business Services, Financial Services & Payroll

1. INTRODUCTION AND PURPOSE

The following is a list of restricted and unallowable charges for official university business. Purchases made on sponsored programs or indirect costs (IDC) funds or student club accounts may have additional considerations. Questions about an expense not listed should be directed to department coordinators, supervisors, the Office of Grants and Sponsored Programs, or a Business Services representative.

2. UNALLOWABLE EXPENSES

Unallowable expenditures include, but are not limited to:

- A. Airfare - seat upgrades unless ADA approved. ADA declaration documentation must be provided.
- B. Cash - cash withdrawals or non-travel cash advances.
- C. Donations **or Sponsorships** - contributions or donations, including financial donations or gift components when registering for a conference, or “rounding up” at a merchant to donate to a cause or organization. ~~Except for~~ Donations from student club accounts **are allowable**.
- D. Fuel – fuel expenses for personal vehicles – must request mileage reimbursement on travel expense report.
- E. ~~Hospitality~~ **Personal items and office supplies – hospitality personal use** related office supplies (coffee, plates, napkins, tissue, etc.), **gifts (greeting cards, flowers, retirement gifts) and other products** that are intended for employee consumption **or use**.
- F. Memberships **or entry fees** - memberships such as Costco or Amazon where MSUB has corporate programs **or entry fees such as golf tournaments or Wine Festival**.
- G. Services - services provided by an MSUB employee. Payment should occur through the Payroll Office.
- H. Transactions - dividing transactions to circumvent purchasing thresholds. See General Purchasing Guidelines.

3. RESTRICTED EXPENSES

Restricted expenses include, but are not limited to:

- A. Alcohol and Drugs - purchase of drugs and alcohol or any substance, material or service, which violates policy, law or regulations is not allowed with the following exceptions:
 1. Alcohol and Drugs **including marijuana**- see the [Campus Alcohol and Drug Policy](#).
 2. Drugs - may be purchased for medical purposes or for a sponsored research project **registered with the State of MT and the Federal DEA**.
 3. Tobacco - see the [Tobacco Free Campus Policy](#).
- B. Clothing (non-uniform) - certain clothing may be purchased if it is required and utilized for protective personal equipment (PPE), research, or education (e.g., scrubs, lab coats, etc.). If

- purchased on sponsored program funds, include justification. Clothing items such as MSUB-branded shirts for events where employees represent the university may be allowable under specific conditions and are subject to a taxable threshold. See Restricted and Unallowable Policy Procedure.
- C. Gifts - gifts must serve official university business and are subject to additional requirements.
 - 1. Purchase of gift cards or gift certificates including from agency accounts is not allowed except for gift cards or certificates used for research or survey participants which are subject to additional requirements. See Restricted and Unallowable Expenditures Policy Procedure.
 - 2. Gifts purchased as raffle prizes need to follow the Raffle Prizes Policy.
 - D. Graduation Regalia - regalia for faculty and other campus leaders who participate in graduation may be provided by the University when approved by the applicable vice-chancellor/chancellor.
 - E. Equipment - Equipment with a trade-in. Contact Financial Services Office.
 - F. Moving / Relocation Expenses or Allowances - relocation allowances when approved by the applicable vice-chancellor/chancellor are taxable and paid through payroll.
 - G. Parking Permits and Citations - long term MSUB parking permits for privately owned vehicles and payment of parking citations are not allowed with the following exceptions:
 - 1. Parking permits can be purchased for university-owned, State of Montana, or government vehicles.
 - 2. Short-term parking permits can be purchased for visitors on official business only. See Restricted and Unallowable Expenditures Policy Procedure.
 - 3. When grant funded, which is subject to additional requirements. Contact Sponsored Programs for guidance.
 - H. Hospitality for Official Guests - expenses for official hospitality, community relations and public relations are allowed only when those activities are directly related to the unit in accordance with MUS Policy and Procedures Section 205.4. If the hospitality is to benefit academic or administrative candidates the academic and administrative recruitment policies and procedures must be followed.
 - I. Food or Light Refreshments –expenses for food or light refreshments are restricted. Those authorized to approve hospitality must determine that the activity is directly related to an objective of the unit and evaluate the importance of the event in terms of cost versus benefits and alternatives that would be equally effective. If the total cost for food or light refreshments, including setup/takedown, will exceed the threshold set by BOR policy 205.4, a Hospitality Form must be approved prior to the time the expense is incurred, and reimbursement requests must be accompanied by the Hospitality Form (See Unallowable and Restricted Expenses Procedure). On-campus events must utilize the University contracted food service vendor, for exceptions see the Unallowable and Restricted Expenses Procedure and Hospitality Approval Form. Light refreshments are defined as non-alcoholic beverages and/or prepared items like sandwiches, pastries, vegetable trays, fruit plates, or items of a similar nature. Expenses for food or light refreshments are restricted to the following activities:
 - 1. Educational expenses including workshops, seminars and conferences where food is included as part of the cost.
 - 2. Expenses from student government and agency fund accounts with prior approval from Vice Chancellors or Chancellor.
 - 3. For meetings between students and faculty or administrators, only the cost of light refreshments may be defrayed.
 - 4. Grant or contract activities when specifically authorized in the grant or contract.
 - J. Purchase of food items or food supplies to be prepared for consumption is not allowed with the following exceptions:

1. Student field trips that include meal preparation as part of the course syllabus or function of the trip
 2. Student groups may purchase grocery or prepared items in place of per diem.
- K. Recruitment of Prospective Students – expenses relating to recruitment of prospective students are not considered entertainment. These expenses are part of a unit's normal function and as such may be approved by the appropriate department chair, director or dean. Hospitality forms are not required for recruitment expenditures.