

**AGREEMENT FOR CONSULTING SERVICES  
BETWEEN  
AGB INSTITUTIONAL STRATEGIES AND MONTANA UNIVERSITY SYSTEM on behalf of the UNIVERSITY  
OF MONTANA**

THIS AGREEMENT is entered into by and between MONTANA UNIVERSITY SYSTEM on behalf of the UNIVERSITY OF MONTANA, 2500 Broadway, Helena, MT 59601 (State), and AGB Institutional Strategies, LLC 1133 20<sup>th</sup> Street Suite 300, Washington, DC 20036 (AGB or Contractor).

**THE PARTIES AGREE AS FOLLOWS:**

1. **Contract Term.** This contract shall take effect upon execution and will conclude upon the performance of the services set forth herein.
2. **Scope of Services.** AGB shall provide the services set forth in AGB's response to the State's limited solicitation issued on November 21, 2017.
3. **Designated Consultant.** The above services will be provided by Jim Hundrieser, Ph.D. and Contractor's consultants.
4. **Payment.** In consideration for the services to be provided, State will pay the Contractor a fee of approximately \$17,000.00 on the schedule set forth as outlined in Exhibit "A". Limited solicitations and any contract payments cannot exceed \$25,000.00.
5. **Direct Expenses.** In addition to the payment amount set forth in Section 4, State shall pay reasonable expenses, such as travel, meals and lodging expenses, rental car, telephone charges, materials, postage, courier or fax charges, etc., necessary to carry out the work. Meals will be reimbursed at a rate of \$11.00 for breakfast; \$12.00 for lunch and \$23.00 for dinner or \$46.00 per day. Whenever possible, State staff should be contacted to make airline travel (normally coach class fare only) and lodging arrangements in order to try and secure the state hotel rate.
6. **Liaisons.** All project management and coordination and all notices sent on behalf of either party shall be through the liaisons indicated below:

MUS/UM Liaison:      President's Office  
                                 University of Montana  
                                 C/o Rebecca Power  
                                 UH 109  
                                 32 Campus Dr. MS 3324  
                                 Missoula, MT 59812  
                                 (406) 243-2311

AGB Liaison:            Jim Hundrieser, Ph.D.  
                                 Search Consultants

1133 20<sup>th</sup> Street, Suite 300  
Washington, DC 20036

7. **Execution.** This Agreement may be executed in several counterparts, including fax and pdf counterparts, each of which and all together shall be but one Agreement. The Parties through their authorized agents have executed this contract on the dates set out below:

DATED: 12/1/17

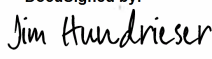
University Of Montana by and through the  
Office of the Commissioner of Higher Education  
2500 Broadway  
Helena, MT 59601



Name: Tyler Trevor  
Title: Deputy Commissioner of Higher Education

DATED: 12/5/2017

AGB Institutional Strategies  
1133 20<sup>th</sup> Street, Suite 300  
Washington, DC 20036

DocuSigned by:  
  
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Name: Jim Hundrieser, Ph.D.  
Title: Associate Managing Principal

November 21, 2017

Viv Hammill,  
Chief Legal Counsel  
Montana University System  
2500 Broadway  
Helena, MT 59620

Dear Ms. Hammill,

The Association of Governing Boards of Universities and Colleges Institutional Strategies (AGBIS) is pleased to submit this engagement letter to the University of Montana.

**Project Overview and Scope of Work:**

The University of Montana (UM) seeks a consultant(s) to assess the current state of the enrollment management functions with a focus towards increasing the effectiveness and efficiencies related to undergraduate enrollment.

The assessment will provide a summary AGBIS report which includes observations, analysis of current state, and recommendations for action aimed at increasing enrollment or enhance enrollment functions, systems or processes to attract and enroll more undergraduate first-year and transfer students.

AGBIS will use a collaborative approach for this analysis working with the admissions, admissions operations, IT, financial aid, marketing and communications, and other key offices focusing on:

- **Assessment of current enrollment activities,**
- **Ways to increase top of the funnel engagement,**
- **Speed, Service, and Statistics,**
- **Financial aid leveraging strategies, and**
- **Confirmation to attendance strategies.**

AGBIS will deliver to the incoming President and Commissioner recommended strategic building blocks to a sustainable and more efficient enrollment model that aligns with state and University goals.

**Participation and Collaboration:**

AGBIS understands the importance of building consensus on situational assessments, exploring alternatives and securing input from stakeholders. This assessment visit will seek to actively engage with key offices to better understand current challenges, systems, processes, and activities focused on recruiting and enrolling first-year and transfer students. To do this, it will be essential to engage:

- Vice President for Enrollment Management and Student Affairs
- Admissions/Recruitment Staff
- Admissions Operation Staff
- Financial Aid Staff
- IT personnel that support enrollment functions
- Marketing and communications personnel that support enrollment functions
- Key athletic staff charged with ensuring rosters sizes are at capacity



- Staff that support the processing of transfer applications and/or assignment of credits

#### **Phase One – Visit Preparation:**

- Funnel details (prospects, inquiries, applicants, completed applications, confirmation, enrollment) past three years plus current data to date
- Marketing and communications plan for current inquiry/admit pool, plus fall 2019 and 2020 engagement strategies
- Name purchasing strategies
- Sample comm flow by student type (sophomore, junior, senior high school, and transfer)
- Annual recruitment plan
- Strategic enrollment plan (3 to 5 year plan to increase enrollment)
- Territory management strategy (goals by territory)
- Financial aid leveraging strategy
- Demographic and major interest data
- CRM and other IT system support
- Workforce needs and opportunities within the state and region
- Other data or analysis conducted related to enrollment of new students particularly analysis completed to understand the decrease in new student enrollment

#### **Phase Two – Campus Visit:**

- Visit designed to get to know the campus, key leaders and staff focused on enrollment, and understand opportunities and challenges faced by the University of Montana related to enrollment
- Assessment of both strengths and challenges facing the University and the competitive position and financial opportunities for the institution
- Opportunities for growth with key assumptions aligned with the macro trends shaping higher education
- Compare current practice activities with best practice or emerging practices to improve speed, service, and statistics in responding to students interested in UM.
- Identify potential areas of focus to increase enrollment for fall 2018 and fall 2019.

#### **Phase Three – Written Report:**

- Exit Meeting —formal meeting and presentation with initial reflections from campus visit
- Draft Final Report—for president and commission review and feedback
- Final Report—Specific recommendations for growth or development to recruit and enroll more students at the University of Montana

Final Written Report: Completed by January 15, 2018

#### **Cost:**

Phase One: \$2,500(Completed before visit)

Phase Two: \$12,000

Phase Three: \$2,500 (Completed by January 15, 2018)

This amount excludes travel expenses for AGBIS consultants. Travel expenses will be submitted for reimbursement with receipts following guidelines for travel established by University of Montana.

- Includes cost of consultants working on the project.
- This amount includes all AGBIS costs required to deliver the scope of work outlined in this engagement letter.

- Additional subject matter experts hired at \$1200 per day plus any related travel costs as determined by the Commission or UM staff appointed to lead this project.

This amount does not include any work requested by UM which may arise within or after the project timeline which will be subject to additional time and material costs; however, any requested work would not be performed without the expressed written permission the University of Montana.

**Invoicing for Project:**

AGBIS will invoice with the following installments:

- \$10,000 at signing of engagement letter
- Remaining balance (including subject matter expert stipends) after submission of final report

Should this engagement letter meet with your approval, please sign and we will begin. Please do not hesitate to contact me if you have questions or need additional information. I can be reached at 603-481-0649.

Sincerely,

Jim Hundrieser, Ph.D.  
Associate Managing Principal  
AGB Institutional Strategies

**Enclosed:**

*Acceptances*

On behalf of the Association of Governing Boards of Universities and Colleges:

Richard A. Beyer, Managing Principal for AGB Institutional Strategies

Rick Beyer Managing Principal

**Print Name and Title**

DocuSigned by:

*Rick Beyer*

12/5/2017

**Signature**

5649471E12914F2...

**Date**

On behalf of the University of Montana

\_\_\_\_\_  
Print Name and Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date