During the 2014/2015 College Access Challenge Grant (CACG) cycle, the University of Montana (UM) Financial Education Program continued to serve students and other members of the UM community according to Montana University System (MUS) Financial Literacy Concepts and Best Practices. The 2014/2015 grant cycle largely focused on Program expansion and increasing the number of active collaborations with campus and community partners. To date, the Program has over 25 active partnerships.

Highlights of the 2014/2015 grant cycle include: continued Program growth and increasing numbers of students and UM community members served: over 6,800 students received services from the Program during the 2014/2015 grant cycle; securing a more appropriately private, spacious and highly visible office space for the Program in Griz Central and administrative office space in the Office for Student Success; increased marketing and promotion efforts to advertise the Program brand and ensure that students are aware of Program services; conducting various campus workshops, seminars, training and class visits on financial literacy education for UM students and staff; partnering with Montana University System Student Financial Services (MUS SFS) to produce several financial literacy education videos for students across the MUS through UM's KPCN film production team, including videos designed to improve the student loan entrance counseling process for all MUS student borrowers; presentations at Montana Board of Regents and the National Summit on Collegiate Financial Wellness to showcase Program as a critical component of overall MUS statewide effort; and significant progress on the Program’s communication and assessment plans.

2015/2016 UM CACG objectives include:

Mountain Campus:

- Continue all Program services and maintain M-F, 8am-5pm hours of operation
- Continue progress on MUS student loan entrance counseling supplemental video project
- Continue growth of Program as measured by students and other UM community members served: 20% in the Fall and 15-10% in the Spring
- Work with Division of Student Affairs to ensure Transit implementation and monitoring is successful.
- Increase outreach to Transfer students. Specifically, email outreach letting them know they can do a “Student Loan Checkup” to make sure they can manage/pay for the remainder of their education
- Complete the Default Calculation and separate the default rates of the three campuses
- Collect and analyze Transit data
- Complete more data analyses for assessment and reporting purposes
- Collaborate with academic departments to have a stronger presence in classrooms
- Work with community entities to host a Free Credit Review Day (as done at Champlain College and presented on at the National Summit on Collegiate Financial Wellness) for students to have their credit report reviewed and receive suggestions on how to strengthen it
- Complete and fully implement Program communication plan using Hobson's Retain CRM
- Complete Program assessment plan

Missoula College:
- Workshops targeted to the Missoula College population (e.g. affordable childcare)
- Work with Missoula College Department of Applied Arts and Sciences to develop a mini-lecture for math students studying Simple Interest to show the applications of the subject as well as the necessity of handling student loans correctly
- For West Campus – offer a workshop on how to fund the tools/licenses that their future jobs will require (e.g. mechanics can be required to supply their own expensive tools)

Bitterroot College:
- Modify the BC orientation we already do. Split Program time into two different sessions (loan entrance counseling and personal finance) and allow students to choose which one they would like to attend. This will allow us to do loan entrance counseling with these students but still offer something for those that do not have student loans or do not wish to participate