Academic Portfolio Review and Integration Process  
DRAFT  
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Purpose  
The University of Maine System faces the combined challenges of declining New England demographics, enhanced competition for students, little ability or desire to increase tuition load on Maine families and flat or declining state appropriations. In response to these challenges and in order to enhance the quality, access and variety of its academic offerings, the system must accomplish a complete, rational restructuring of its academic portfolio. This includes administrative structure, policies, procedures, and culture, with the goal of optimally positioning the academic functions of the UMS to fulfill its mission of instruction, research and public service. Strategies to meet these goals may include sharing curriculum, developing joint program and possibly departments, leveraging interactive distance technologies, and consideration of the overall portfolio of programs given state needs.

This rational restructuring will be done in a way that balances the system-wide academic portfolio while embracing the evolving differentiated missions, identities and brands of the seven unique and independently accredited universities. Fiscal and demographic pressures will drive the need for innovation and greater coordination and collaboration across UMS academics.

Charge  
University of Maine System academics will restructure to enhance quality and expand access to its collective portfolio while achieving necessary fiscal efficiencies. The Chief Academic Officers (CAOs) of the UMS institutions will design and guide the development of the restructuring effort. They will establish sub-teams to investigate and report back on specific academic affairs content areas. A high-level Process Advisory Group (PAG) will monitor progress and engage stakeholders in developing a comprehensive change strategy to achieve the goals of quality, access and efficiency. This restructuring effort will produce an approximate targeted personnel savings in Academic Affairs of $18M over the next 4-5 years. This includes the position reductions made to balance FY15. The approximate non-personnel savings in Academic Affairs is $6M. The target savings amount will be further refined and may be offset by revenue growth. The plan will better leverage the academic capacity of faculty and staff and create an integrated academic portfolio that best serves our geographically-dispersed student population. Without undertaking this very deliberate process, personnel reductions in silos throughout our System will lead to further campus enrollment declines.

Responsibility and Authority  
Overall adherence to timelines, goals and communication requirements will be monitored by a Process Advisory Group (PAG). The PAG will include the VCAA (Chair), a Trustee, a President, Faculty (2), a Board of Visitors Member, Provosts (2), and a Student Affairs representative. This group will be empowered to charter and deploy sub-teams, as developed by the CAOs, to focus on specific aspects of the project. Every campus will have representation on the PAG.
Faculty Senate/Assemblies of UMS institutions will be asked to provide input throughout the process regarding recommendations describing change in academic organization.

Final approval of recommendations including implementation of change in academic structure will rest with the President’s Council, VCAA, Chancellor and, ultimately, the Board of Trustees.

**Role of the Chief Academic Officers**
The CAOs will play a central role in the academic portfolio review and reorganization process, developing ideas and strategies and identifying areas of emphasis. Initially the group will work to:
- Identify the sequence of academic programs or areas on which to focus
- Identify possible impediments to collaboration/integration and create recommendations to overcome them.

The CAOs will also address the potential need to:
- Develop target reductions in FTE faculty/staff in identified program areas
- Develop target enrollment increases to be achieved through improved coordination and alignment
- Develop FTE faculty growth strategies in areas of high need and enrollment growth

The CAOs will create sub-teams to accomplish this work and those teams will report back to the CAO group which will in turn report to the PAG. Input from academic affairs stakeholders (students, faculty, staff and external community members) will be solicited in a manner to be determined by the CAOs.

The initial teams may consider such topics as academic structure models operating in other university systems (including a financial analysis), the enhanced technology needed to deliver high quality academic programming across a large geographic space, and accreditation issues that need to be addressed in any reorganization effort.

Sub-team reports will be delivered to the CAOs, PAG, President’s Council and Academic and Student Affairs Committee of the Board of Trustees and made broadly available through a website.

**Communication**
Initiative design, sub-team reports and draft and final recommendations will be communicated through numerous avenues. Sub-team reports and draft and final recommendations will be disseminated to the CAOs, PAG, President’s Council and Academic and Student Affairs Committee of the Board of Trustees and made broadly available through a website. The VCAA and President on the PAG will make regular reports to the President’s Council, Academic and Student Affairs Committee of the Board of Trustees, and full Board of Trustees. The VCAA and CAOs on the PAG will be in regular, ongoing communication with the entire CAO group. The CAOs and faculty on the PAG will establish procedures to insure communication to the entire faculty through the Faculty Senates/Assemblies. PAG members will be responsible for communication to their respective constituent groups.
Key Deliverables
APRIP sub-teams will investigate and present recommended models that are grounded in a financial reality that matches the situation faced by the UMS. Recommendations will need to take into account the differentiated identities and specific missions that will allow individual campuses to sustainably serve their constituents while being mindful of the overarching need to cost-effectively serve the state as a collective system.

The goal of this process will lead to delivery of a comprehensive set of recommendations on UMS academic programs and policies to the Chancellor and the Presidents, and the Board of Trustees through the Progress Advisory Group.

Role of the Process Advisory Group
The PAG will to provide review and endorsement of initiatives developed by the CAOs, guide the process, and hold the various teams accountable to timelines.
- Each member of the PAG will have important assignment as a communication liaison to their constituents
  - Every meeting will include a reporting in about communication delivered since last meeting and questions raised that need to be considered by the group
  - Every Presidents Council and CAO meeting will have a report in by their representative, in partnership with the VCAA
  - Every meeting will have a segment focused on past month, next month and 2 months downstream, providing everyone an alert to what is to be set up next.
- Opportunities for PAG members to be sub-team leaders or participants will be a goal.

Process Advisory Group –Composition
- Chair – VCAA
- Trustee – Adm. Gregory Johnson
- President – Dr. Kathryn Foster - UMF
- BOV member – Dana Saucier – UMFK
- CAOs – 2 representatives, one from big campus and one from small campus
  - Dr. Raymond Rice – UMPI
  - Dr. Jeffrey Hecker - UM
- Student Affairs representative – Kathleen Dexter, Dean of Students - UMA
- Faculty – 2 representatives, one from big campus and one from small
  - Dr. Eric Jones – UMM
  - Dr. Gary Johnson - USM

Chief Academic Officers
Jeffrey Hecker, UM
Joseph Szakas, UMA
Daniel Gunn, UMF
Robert Dixon, UMFK
Stuart Swain, UMM
Raymond Rice, UMPI
Michael Stevenson, USM