

University of Maine System
FY18 UNIFIED BUDGET
Finance Task Team Charter on Tuition & Fees
As of 1-8-16

PURPOSE

To establish the roles and responsibilities of the task team of Finance on: *Tuition and Fees*.

CHARGE

The task team of Finance: Tuition and Fees has responsibility for successful completion of the analysis of options and a set of recommendations by April 1, 2016.

Task teams are to use the first two steps of the four-step process of: **analysis, design**, implementation and audit.

This finance sub-team is to study the finance topic, narrow the set of options, and recommend one for adoption. Updates and recommendations are to be delivered to the CBO/finance group that established this charter. Ryan Low (CFO) is the final decision-maker of questions about this charter and what recommendations are presented to the Chancellor and BOT for consideration.

The task team's draft report is due May 13, 2016.

SCOPE OF EFFORT

- Includes *policy and rate-setting* elements, but not allocation
- Comprehensive evaluation of tuition, including:
 - Both *graduate and under-graduate*
 - *In-state, OOS, NEBHE*
 - *Dual enrollment and bridge programs*
 - Rate(s) for *Online*
 - Rates(s) for *Independent Studies*
- Includes *all Fees*
 - *Current* and *future*
 - Both *system* and *campus*
- Includes a recommendation for a *transition* from current to future state
- Includes all *Waivers*

In this phase, *limit scope to matriculated students*. Out of scope includes: room and board, contracted seminars, non-matriculated student tuition, or 3rd-party fees.

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KEY DELIVERABLES

Deliverables include:

1. List of key stakeholders for this topic (three rings of stakeholders: a) on team, b) need tight consultation throughout process, and c) get some input and/or review).¹
2. Summary of all inputs, including benchmarked models (details can be placed in an Appendix)
3. Description of how the task team narrowed the options, and selected the recommended option (if accomplished)
4. Common lexicon (definitions) of terms and concepts
5. SWOT (Strengths/Weaknesses/Opportunities/Threats), or the equivalent, analysis of the options (or narrowed options if options number more than 3 in number)
6. Recommendation(s), with supporting rationale
7. Suggested phases / timeline for transition
8. Summary of any minority opinions

ASSUMPTIONS FOR THE TEAM TO INCORPORATE AND/OR TEST AS PART OF ITS WORK

1. *(List all assumptions to be tested)*

TEAM COMPOSITION

The Task Team will be led by Tim Brokaw (CBO, UMA), and consist of the following members:

- Miriam White, Director of Budget and Financial Analysis - UMS
- Pamela Ashby, Director of Administrative Services for UMFK
- Laurie Gardner, CBO for UMF
- Ben Shaw – CBO for UMPI
- Mel Adams, Dean of Student and Enrollment Services – UMM
- Joel Wincowski, VP for Enrollment Management - UM
- Keith Dubois, Director of Student Financial Services – USM
- Sharon Nadeau, Director of Administrative Systems - UMF

OPTIONS/ALTERNATIVES THAT SHOULD BE PART OF THE TEAM'S ANALYSIS (CONSIDERATION)

- Tiered tuition
- Differential program fees
- Differential tuition
- Off season rates
- Airline model (discounting to fill the seats)
- Block tuition
- Fees to support facilities (rec. center)

¹ There is a fourth ring: "all UMS employees", but this will be addressed by Ryan and OE.

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KEY DESIGN CONCEPTS TO CONSIDER (ALL TASK TEAMS)

- How does the recommended solution motivate/incent the behaviors we want?
- How does it positively impact multi-campus students?
- How does it positively impact collaborative-degree programs?
- How does it positively influence customer service to students/employees?
- How is the assessment/reflection/review/audit piece built in?
- A preliminary check against accreditation standards.

STAKEHOLDERS TO CONSIDER IN RINGS 2 OR 3:

- Presidents
- CAOs
- Cabinets
- Student financials
- Enrollment managers
- Admissions (UG/Grad)
- Financial aid directors
- Student government leaders
- Faculty representatives (deans, chairs, etc.)