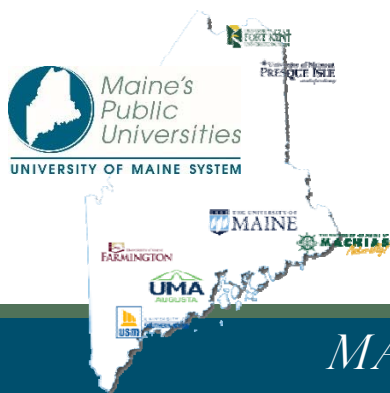


# Strategic Resource Allocation Planning

Board of Trustees Update

July 2017

Dr. Rebecca M. Wyke



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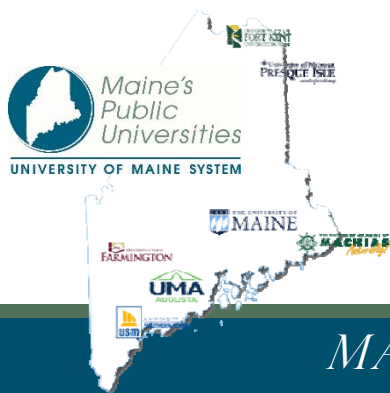
# Board of Trustees Priority Outcomes

## Primary Outcomes:

- Increase Enrollment
- Improve Student Success & Completion
- Enhance Fiscal Positioning
- Support Maine through Research & Economic Development

## Secondary Outcomes:

- Relevant Academic Programming
- University Workforce Engagement



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# Resources Available to Support the Plan

## FY2018 – FY2020

### Proposed Resources

|                                     | FY2018             | FY2019             | FY2020             |
|-------------------------------------|--------------------|--------------------|--------------------|
| Early College Appropriation*        | 1,500,000          | 1,500,000          | 0                  |
| Administrative Review Savings       | 3,076,740          | 3,076,740          | 3,076,740          |
| 30% of New Appropriation            | 225,000            | 225,000            | 225,000            |
| Surplus Temporary Investment Income | 4,043,000          |                    |                    |
| Sub-total by Year                   | <b>\$8,844,740</b> | <b>\$4,801,740</b> | <b>\$3,301,740</b> |

### TOTAL

**\$16,948,220**



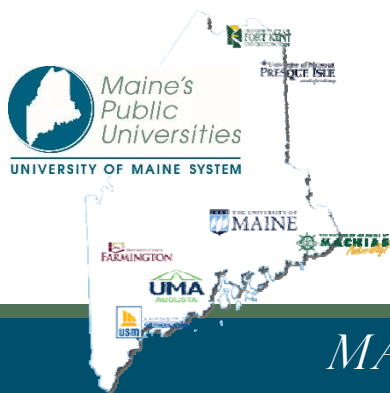
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# Recommended Investments & Metrics

## FY2018 – FY2020

| Proposed Investments: Increase Enrollment |                    |                    |                  |
|---|--------------------|--------------------|------------------|
|   | FY2018             | FY2019             | FY2020           |
| Early College: NACEP Standards for QC     | 1,500,000          | 1,500,000          | TBD*             |
| Enrollment Management for Small Campuses  | 375,000            | 375,000            | 375,000          |
| Market Research                           | 100,000            | 100,000            | 100,000          |
| Marketing of Academic Programs            | 300,000            | 300,000            | 300,000          |
| <b>Sub-total Increase Enrollment</b>      | <b>\$2,275,000</b> | <b>\$2,275,000</b> | <b>\$775,000</b> |

| Metric   | 5-Year Target  |
|--|--|
| Achieve or exceed the 5-year enrollment management projections and the corresponding revenue estimates in the MYFA | Year over year improvement to achieve/exceed overall 9.5% enrollment increase by FY22* |



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# Recommended Investments & Metrics

## FY2018 – FY2020

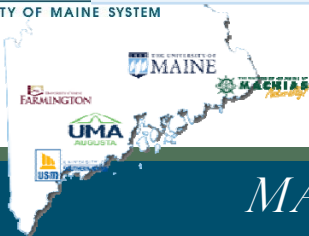
### Proposed Investments: Improve Student Success & Completion

|   | FY2018           | FY2019           | FY2020           |
|---|------------------|------------------|------------------|
| Institutional Research & Reporting Team                   | 684,164          | 701,268          | 718,798          |
| Student Success Early Warning Tool                        | 183,000          | 115,000          | 115,000          |
| Professional Development for EM & Advising                | 100,000          | 100,000          | 100,000          |
| <b>Sub-total Improve Student Success &amp; Completion</b> | <b>\$967,164</b> | <b>\$916,268</b> | <b>\$933,798</b> |

| Metric   | 5-Year Target  |
|--|--|
| Achieve retention and completion rates equivalent to or better than peer institutions  | Year over year improvement to achieve/exceed peer benchmark* of X% retention and X% completion rates |
| Achieve student satisfaction/engagement rates equivalent to or better than peer institutions   | Year over year improvement to achieve/exceed peer benchmark* of X% satisfaction/engagement           |
| Demonstrate through alumni satisfaction surveys that UMS graduates indicate they are well-prepared for the workforce or graduate education | X% of graduates indicate they are well-prepared for workforce or graduate education**                |
| Reduce the average debt of students within the UMS   | Year over year improvement to achieve/exceed peer benchmark* of \$X average debt                     |



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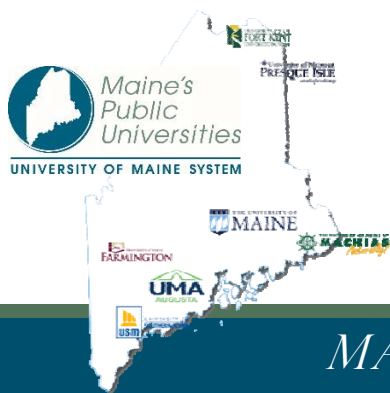
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# Recommended Investments & Metrics

## FY2018 – FY2020

**Proposed Investments: Enhance Fiscal Positioning – N/A**

| Metric  | 5-Year Target   |
|---|---|
| Eliminate the Structural Budget Gap   | Year over year decrease in the structural gap with elimination of the gap by FY21 or sooner |
| Achieve year over year improvement in the Core Financial Ratios                                     | Year over year improvement to achieve/exceed Composite Financial Index of 3.0 by FY22*      |
| Acquire the investment funds necessary for implementation of the Strategic Resource Allocation Plan | Achieve appropriation targets for FY18 to FY22  |



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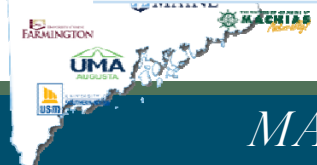
# Recommended Investments & Metrics

## FY2018 – FY2020

### Proposed Investments: Support Maine Research & Economic Development

|  | FY2018             | FY2019             | FY2020     |
|--|--------------------|--------------------|------------|
| Research Reinvestment Fund                                 | 2,100,000          | 2,100,000          | TBD        |
| <b>Sub-total Support Maine Research &amp; Economic Dev</b> | <b>\$2,100,000</b> | <b>\$2,100,000</b> | <b>\$0</b> |

| Metric  | 5-Year Target   |
|---|---|
| Increase investment in R&ED initiatives that support Maine business and industry  | Achieve MEIF targets for FY18 to FY22                             |
| Increase number of commercialization and other partnerships with Maine industry   | Year over year improvement to achieve X new partnerships by FY22* |
| Demonstrate through impact studies by major programs an upward trend-line of economic impact on relevant industries   | Year over year improvement to achieve X% economic impact by FY22* |
| Demonstrate through impact studies by campus an upward trend-line of community engagement and investment  | Year over year improvement to achieve X% engagement by FY22*      |
| Demonstrate through employer satisfaction surveys that UMS graduates are meeting demands for labor, including for specific skills and occupations, and that graduates are well-prepared to fill workforce needs | X% of employers indicate satisfaction with graduates*             |



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# Recommended Investments & Metrics

## FY2018 – FY2020

| Proposed Investments: Relevant Academic Programming |                  |                  |                  |
|---|------------------|------------------|------------------|
|   | FY2018           | FY2019           | FY2020           |
| Academic Programming Innovation Fund                | 825,000          | 825,000          | 825,000          |
| <b>Sub-total Relevant Academic Programming</b>      | <b>\$825,000</b> | <b>\$825,000</b> | <b>\$825,000</b> |

| Metric   | 5-Year Target  |
|--|--|
| Track program vitality through ongoing development of sustainable, innovative programs that meet regional and state needs              | Identify programs for examination on the basis of three-year rolling averages of: number of graduates per year (5 per UG program, 3 per master's program and 2 per doctoral program), number of undergraduate majors (15), and number of program faculty (3) |
| Increase student access and success through ongoing development of sustainable, innovative programs that meet regional and state needs | Increase the number of new or revamped programs by a minimum of 2 per year   |
| Leverage faculty expertise and resources through shared program delivery   | Increase the number of programs by at least 2 per year, with 12 multi-campus programs in place, or under review for implementation by faculty review Senates/Assemblies or NEASC   |
| Quantify the market opportunities for growth of online programs aligned with university capacity                                       | Quantify/identify market opportunities for new online programs by March 2018   |



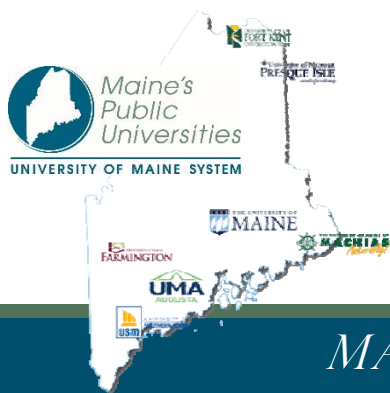


# Recommended Investments & Metrics

## FY2018 – FY2020

| Proposed Investments: University Workforce Engagement |          |                 |          |
|---|----------|-----------------|----------|
|   | FY2018   | FY2019          | FY2020   |
| Workforce Engagement Survey Tool                      | 0        | 20,000          | 0        |
| <b>Sub-total University Workforce Engagement</b>      | <b>0</b> | <b>\$20,000</b> | <b>0</b> |

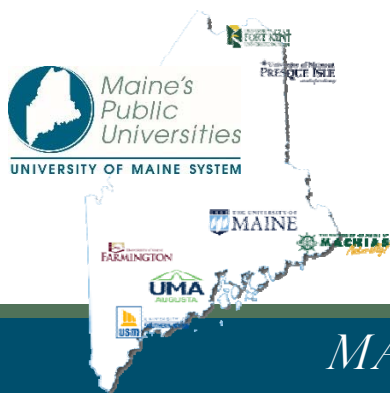
| Metric  | 5-Year Target   |
|---|---|
| Demonstrate through employee engagement surveys continual improvement in engagement scores and the penetration of vision and values | 77% of faculty and staff feel positively engaged in their job role and 67% feel sure about the direction, vision and values of the University ( <i>represents 5% improvement for each metric</i> )* |



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# Gaps: Based on Current Resources

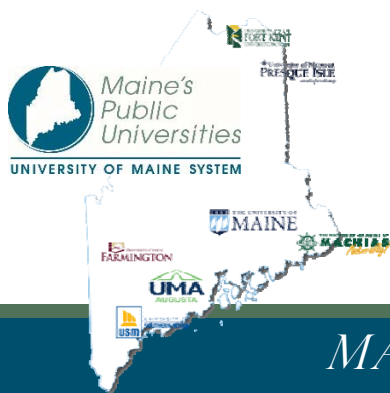
- MaineStreet Data Clean-up Phase II
- Student Retention Incentives
- Student Navigators & Transfer Counselors
- Community Engagement Innovation Fund
- Employee Performance-based Recognition & Rewards
- Continued Funding for the plan in FY2021 & FY2022



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- Visit the website and review:
  - Board of Trustees Priority Outcomes
  - Strategic Resource Allocation Planning Reports
  - Survey Results



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