

Academic Portfolio Review and Integration Process

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Report to the Academic and Student Affairs Committee

UMS Board of Trustees

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Implementation, Communication, and Scope

Implementation

The primary focus of APRIP in the first quarter was to launch the nine discipline-based academic collaboration teams (formerly called “sub-teams”). Team leaders have met at least weekly by conference call and had a “mid-term” gathering on March 27 to compare notes, further understand the expectations for their work, and further develop their data requests. All teams will have recommendations to report by May 31 as scheduled. Some consider this semester’s work to be “phase one” of two or three yet to come in order to address the range of options that interest them. All report tremendous satisfaction and enjoyment from getting to know their colleagues on other campuses and the curricular options elsewhere. This is true despite significant impediments, including confusion on the campuses about the vision and intended results of system transformation activities, understandable conflation of APRIP with similar but unrelated events such as USM program terminations and the new Center in Portland, and a great deal of fear for their own and colleagues’ jobs based on their clear understanding of the system’s structural financial gap and position/program terminations at USM. The Oversight Committee is deeply impressed by the spirit, hard work, and creativity of the academic collaboration teams and eager to support their recommendations as fully as possible.

The team leaders and the Oversight Committee (OC) also reviewed a list of potential barriers to academic collaboration (translated into positive terms, a “needs list” that identifies what we need to do to make collaboration workable). The needs fall into three categories: academic (e.g., differences among campuses in academic calendars, credits per course, and pedagogy), non-financial administrative (e.g., simultaneous registration at multiple campuses, creating a unified tuition and fee bill from multiple campuses, and providing academic advising services that span campuses), and financial administrative (e.g., differing tuition and fee rates, allocation of revenues from one student to multiple campuses, resource allocation incentive structures).

The Chief Academic Officers will review the team recommendations on June 11 and will share their perspectives with the Oversight Committee on June 12. With specific recommendations in hand, both groups will revisit the needs list to identify actions that implementing these recommendations require. They will also identify lessons learned from “Round 1” of the discipline-teams process and use them to shape Round 2. The two groups will define and authorize teams for Round 2 at their July meetings for kick-off in early September.

The Chief Academic Officers are also preparing to engage in academic program portfolio review, identifying programs that need to improve on fiscal sustainability and mission-

relevance or state need. The CAOs will review those programs from a statewide level rather than in institutional silos, which gives the system a chance to help strengthen valuable programs in a variety of ways or, if necessary, close them. The goal is to incorporate any recommendations in the FY17 budget process.

Communication

APRIP's first quarterly report went to the trustees and all faculty and staff in early April. Oversight Committee member Dana Saucier of the UMFK Board of Visitors found the report to be very helpful and well-received by BOV members. Team leaders, presidents, and other OC members have had little response from the campuses.

Our new communications consultants, Jan Kearce and Laura Moorehead, are principals from Lift360, a Portland firm. They have been interviewing people and observing APRIP activities since the end of March. Communication is currently the Oversight Committee's top priority. The communication plan will focus extensively on using existing meetings and events, empowering people who are working on APRIP with information and encouragement to spread the word in their circles, cascading messages through the organizational chart, and giving everyone meaningful opportunities to engage with the process. Dave Stevens is coordinating and directing the Lift360 engagement.

Scope

APRIP includes both program integration (through the nine academic collaboration teams) and portfolio review (through the Presidents Council and CAOs). It is highly interdependent with internal communications, as noted, and also with market research and program costing. APRIP is also leading us into new territory – the policy, procedure, practice, technology, and talent development changes that academic transformation requires.

Dave Stevens is leading the search for market research expertise to identify opportunities both to build enrollment and to launch or revise academic programs to match state needs. The results will be incorporated into ongoing portfolio review, new program development, and system enrollment development.

In addition, under the leadership of Becky Wyke, McGladrey is producing a program-based costing system that will enable executives to have a single methodology for defining and assessing each program's fiscal sustainability. This is an essential tool for properly assessing net academic program productivity.

The evolving needs list to support academic collaboration is long, significant, and costly in both time and money. During May and June, we will be working with the nine academic team leaders and the CAOs to firm up the list and set priorities and sequencing based in part on the requirements to implement the specific initiatives recommended by the teams and the CAOs. We expect that full implementation will require several years, some progress can be made in FY16, some requests will go into the FY17 budget planning process, and satisfactory progress with academic integration will also require external or other special funding sources.