



UMF Strategic Plan Updates and Year One Steps

Reimagining the University
2021-2024

RECAP: The strategic planning process enabled us to recalibrate our shared understanding of the University's mission and reimagine the way we operate.

Expectations

- State of Maine Establishing Legislation
- Board of Trustees Strategic Directives
- Maine Economic Development Strategy 2020-2029
- UMF Administration, Faculty, and Staff
- UMF Students
- UMF Alumni
- UMF External Stakeholders and Potential Partners
- UMF Partner Universities

Outcomes

- Align UMF with the System and System Universities
- Shape UMF as a Unique "Value Add" to the System
- Leverage Existing UMF Assets and Strengths
- Partner with UMS Universities in Order to Maintain and/or Expand Programs
- Acknowledge and Address UMF Weaknesses and Threats
- Be Recognized for Ensuring Student Success
- Increase Enrollment
- Extend Regional, State, and National Impact
- Cultivate Greater Stakeholder Support
- Achieve Long-Term Financial Sustainability and Growth

The UMF Strategic Plan is a highly detailed, action-oriented blueprint for the University's future

Three-Year Timeline

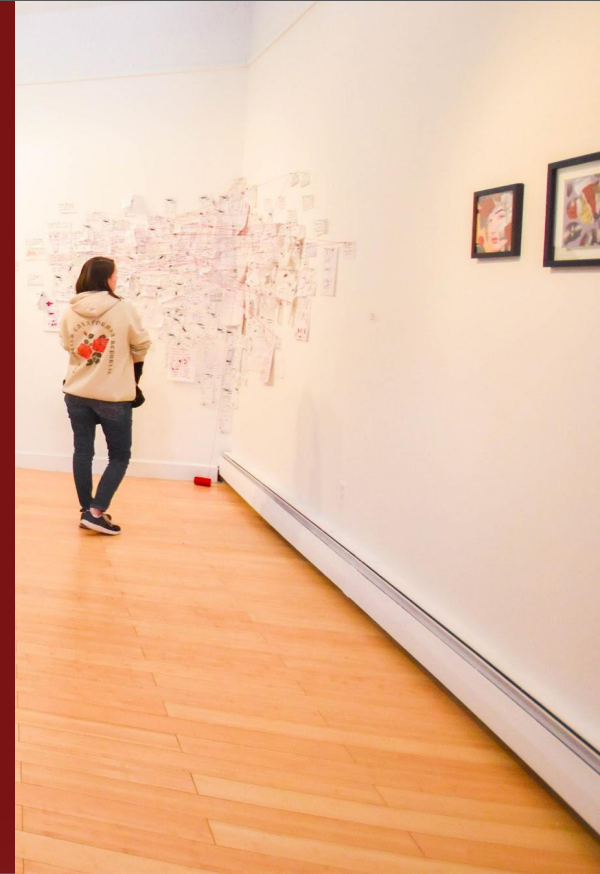
Budget Integration

Focus on the Most Critical Issues

Clear Goals and Architecture for Success

System-Wide Collaboration

Practical Structural Framework



The UMF Strategic Plan responds to the serious challenges facing UMF by setting a timeline of just three years, with specific milestones and objective measures of success set for each year.

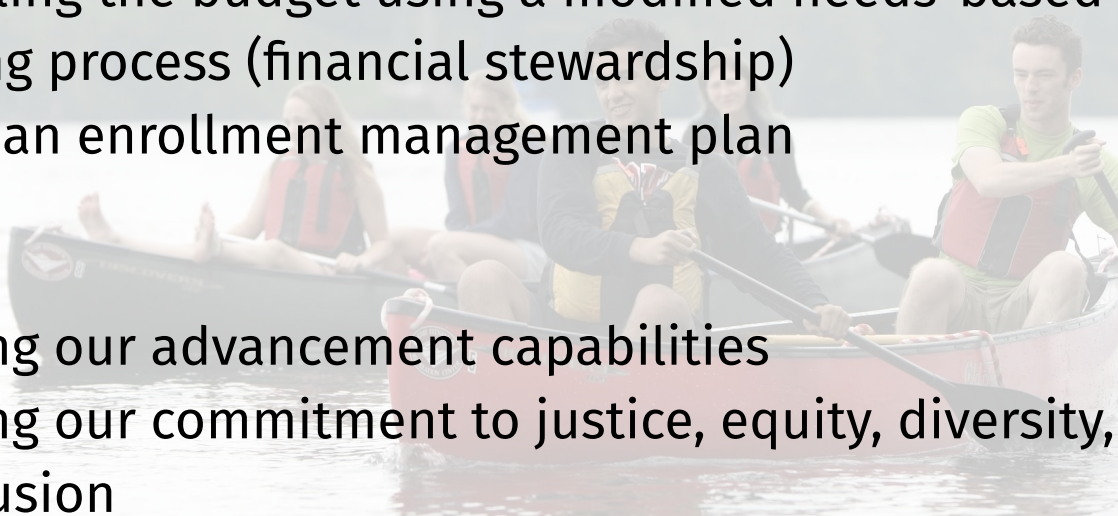
At the same time, the Plan builds a foundation for what follows those three years.

The UMF Strategic Plan directly addresses difficult issues that have historically hindered outstanding organizational performance:

- Setting clear expectations
- Establishing meaningful accountability
- Making data-informed decisions
- Committing to objective measures of excellence, advising and mentoring with consistency and quality
- Collaborating across disciplines and campuses
- Developing campus-wide financial literacy



Year 1: Work Streams and Informing Priorities

- Transitioning from a 4 to 3 credit course system
 - Conducting an organizational review
 - Overhauling the budget using a modified needs-based budgeting process (financial stewardship)
 - Creating an enrollment management plan
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- A group of people are in a canoe on a body of water. The image is faded and serves as a background for the text. The people are wearing life jackets and appear to be paddling. The water is calm, and the background is a soft-focus shoreline with trees.
- Enhancing our advancement capabilities
 - Enhancing our commitment to justice, equity, diversity, and inclusion

Transitioning from a 4 to 3 credit course system



Goal: Address Strategic Plan Objective 3.4, “Improve alignment with the University of Maine System” by “aligning student credit hours, curriculum.”

As outlined by Dr. Ron Hovis in his report *University of Maine – Farmington / Proposed Change from “4 SCH” to “3 SCH” Academic Courses / Potential Financial Impact* (3.28.21), this will necessitate the following work:

- Revise every academic program to reflect a 3 SCH course structure
- Revise every course, including new syllabus
- Revise course rotation and course schedule [and course assignments] for each semester for the next 4 years
- Revise the General Education program
- Revise catalog
- For degrees with program accreditation, communicate new curriculum structure to accrediting body
- Revise the weekly schedule grid

Transitioning from a 4 to 3 credit course system

Process:

- Conversion process began this summer, with around 20% of academic programs, including General Education, submitting draft curricular revisions.
- Fall academic program summits will be organized beginning with Academic Leadership Council on 9.23.

Milestones:

- 9.13.21 Plan was endorsed unanimously by the Board of Trustees Academic and Student Affairs Committee, recommended for endorsement by full BOT.
- 9.27.21 Board of Trustees will vote to endorse UMF's 4-3 conversion plan.
- Early 2022: Complete drafts for academic program changes
- Spring 2022: Midpoint report to System/BOT
- December 2022: Finalization of plan
- Fall 2023: Implementation



Transitioning from a 4 to 3 credit course system

Opportunities for involvement:

Beginning with Fall academic summits: whether distributed in small doses over time or organized as singular retreats, will provide opportunities for programs to engage with representatives from marketing, enrollment, early college, and other domains to further shape the path of their program development.

Most challenging aspect:

This is a massive undertaking and the timeline is aggressive. There are numerous challenges, including integration with other work streams and resolving questions of faculty workload, online education initiatives, interdisciplinary programs, and general education.

Conducting an organizational review

An *Organizational Design Review (ODR)* is an opportunity to:

- Understand current structure and process needs
- Identify the “pinch points”
- Discover strengths and opportunities for collaboration
- Make recommendations based on the University’s vision and goals



Conducting an organizational review

The Process:

- Confidential interviews
- Anonymous surveys
- Looping back to share - and check - what we heard
- Make recommendations in alignment with UMF goals and concurrent work streams



Conducting an organizational review

Additionally:

- Acknowledge we will likely discover there is too much work to do
- Design a sustainable model and focus on what is most important
- Identify opportunities to streamline processes where appropriate
- Continue, stop, start



Financial Stewardship

Goal: Addressing Strategic Plan Objective 3.2, “*Deploy our financial resources with intentionality to deepen our commitment to achieve and maintain long-term fiscal sustainability.*”

- The new approach will be bold, as incremental changes will not be sufficient to narrow the major budget shortfall
- There are two types of change to consider
 - Facilitating
 - Changes that reflect new developments in the external environment
 - Fundamental
 - Changes in existing operations and associated methods - “blocking and tackling”
- Our improvement efforts will focus on **fundamental change**.
- Enhance finance and budgeting processes to ensure appropriate stewardship of financial resources
- Increase financial resources, enhance physical facilities, employ cost effective technology, and adopt sustainable practices

Financial Stewardship

Process

UMF will:

- Use a disciplined, data-informed, and strategic approach to all actions
- Improve understanding of budget, accounting issues, and financial planning at all levels
- Be transparent in the management of the financial resources with which it has been entrusted
- Identify innovative opportunities to increase financial resources for UMF's strategic priorities
- Take responsibility for making smart choices on the use of assets, avoid delay in making necessary decisions
- Regard itself as the trustee not just for the present day, but for the years to come
- Measure success not on where the University is today, but where it will be as it enters its third century.



Financial Stewardship

Milestones:

- Establish KPI targets and goals
- Create a process to review and act on the KPI's
- Bi-weekly meetings of the the Budget Advisory Council
- Review budgets with departments
- Continuous review of revenue generated from credit hours and how it compares to budget

Opportunities for involvement: Each department will be asked to build a budget that is based on their actual needs and supports the workstreams and informing priorities. This modified zero-based budgeting exercise is tied to the work being done in academic affairs.

Most challenging aspect: Tying budgets to recruitment and retention goals.

Creating an enrollment management plan

Goal:

Create an enrollment management plan that:

- reflects the current strategic priorities and aspirations
- works from the strengths of the institution
- acknowledges and addresses our demographic realities

The enrollment management plan will:

- include a sub-plan for the new student financial support model
- overlap with the new marketing and communications plan



Creating an enrollment management plan

Milestones:

- committees convened / first committee meetings
- shared drive organized and opened
- review of information by committees complete
- draft plans complete
- draft plan shared and feedback collection begins
- open meetings held
- final drafts complete by April 2022

Process:

- Convene 3 small committees
 - Enrollment Management starts in October 21
 - Financial Support starts in November 21
 - Marketing and Communications starts in January 22
- Create an open shared drive and three folders where UMF community members can put artifacts and relevant information for the committees to use as they craft draft plans
- Committees will meet weekly, and will spend 1 month reviewing relevant information, 2 months writing the draft plan, 1 month sharing and collecting feedback on the draft plan, and 1 month revising the draft plan based on feedback to create the final plan.



Creating an enrollment management plan

Opportunities for involvement:

- share artifacts and relevant information in the shared drive
- review and provide feedback on the draft plans
- attend open meetings for discussions on the draft plans

Most challenging aspects:

- combing through the relevant information and feedback
- staying on track for time

Enhancing our Advancement Capabilities

Goal: To promote a culture among alumni, affinity groups, community partners, and current or major potential donors that builds a reliable sources of funding to support UMF's vision and strategic priorities.

To achieve this, we commit to:

- An Advancement leader (staff member)
- A vibrant and engaged alumni network
- The establishment of a Foundation
- A Capital Campaign
- Cross campus involvement in philanthropic activity



Enhancing our commitment to Justice, Equity, Diversity, and Inclusion



Goals:

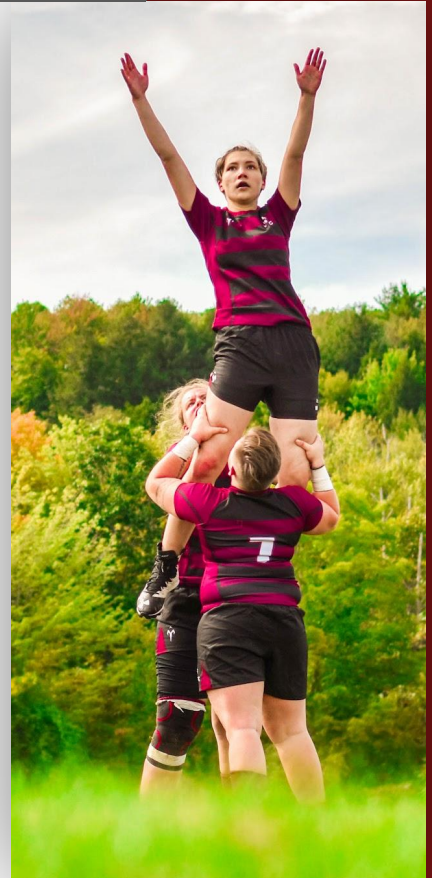
- To promote academic access and success for all students, with special consideration for underrepresented, rural, first generation, and other underserved students.
- To foster a culture of inclusion whereby people of all backgrounds who live, learn, and work at UMF feel welcomed and valued

Enhancing our commitment to Justice, Equity, Diversity, and Inclusion

To meet these goals, we must:

Establish clear roles, responsibilities, and expectations for all faculty, staff, and administrators to support enhancing campus wide diversity, equity, and inclusion, including:

- Faculty and staff recruitment and retention
- Enrollment management plan
- Student financial support model
- Cultivated and allocate resources to programs and services that address these goals
- Build on the work that has already been done



Our overarching task:

*We have strengths to build on and weaknesses to address as we become a **strategic university**, not just a university with a strategic plan.*

Thank you

Q&A

See you at our
next Town Hall