STRATEGIC DIRECTION 8 – USM / UMA INTEGRATION:
First Report
June 5, 2005

I. OVERVIEW

The UMS BOT voted to adopt the UMS Strategic Plan on September 20, 2004. Shortly thereafter, President’s Pattenaude and Lyons were charged with designing a process for implementation planning to begin the integration of USM with UMA. Strategic Direction #8 states that we are to: “Evolve the System organization and structure, clearly defining the mission, niches, and interrelationships of institutions to ensure that the System serves the higher education needs of the State of Maine while moving toward a financially sustainable future.”

The goals as outlined in the Strategic Plan were to:

- Simplify and rationalize the system and free up resources.
- Enhance students’ educational experience
- Build on strengths
- Utilize resources most effectively and efficiently
- Create a sustainable financial paradigm
- Enhance revenue generation
- Clarify decision-making parameters
- Link planning and budgeting

A timeline was developed and presented which stated preliminary recommendations were to be submitted to the Chancellor by June of 2005. (see Appendix A.)
II PROGRESS MADE TO DATE/CHRONOLOGY

Presidents Lyons and Pattenaude along with key staff from both UMA and USM began meeting to determine next steps. Two principles have helped guide our planning process:

1. We will proceed carefully, in a collaborative fashion, honoring and respecting the work of all faculty and staff.
2. We will keep the best interests of students and the community at the center of all discussions.

Planning for implementation was organized in two phases. Phase I, which spanned the period from October 2004 to mid-March 2005, focused on exploration and analysis (see Appendix B). During this period, our activities included:

- The creation of UMA and USM liaison teams of faculty, staff and students. These liaison teams networked for several months, hosting meetings at their respective campuses. Liaison teams retreat resulted in blended progress reports. The student groups created a shared governance document that received the approval of both the Chancellor and Presidents. (see Appendix C).

- UMA/USM faculty designed their own process which included a facilitated retreat resulting in a document summarizing outcomes of their time together.

- Sandra Featherman, President of UNE provided information on the UNE/Biddeford merger.

- UMA/USM senior staffs began meeting to discuss the challenges and opportunities regarding the integration; common listserv for these senior staffs was created for ease of discussion on several issues.

- Campus-wide discussion forums were planned for UMA. Several meetings were held to decide locale, presentation and discussion questions.

- Planning for a Joint UMA/USM Board of Visitors ensued. A planning committee comprised of four members of each board worked to create an agenda for a joint meeting. This meeting was to begin the integration of the two boards into one organization.

- Creation of a UMA/USM integration communication plan and website was designed and provided a vehicle for communication to those interested in finding out information about the integration timeline/process. The Admissions Q & A document is one such piece that was posted to the website (see Appendix D).
● Presidents Lyons and Pattenaude held open-campus Q & A sessions on both campuses and with some community groups.

III. SUMMARY OF PHASE I. ISSUES

Opportunities: Emergent themes

► UMA/USM found much in common (e.g., student body)
► Increased collaboration could strengthen each institution (e.g., UMA could provide expertise in technology, USM could provide access to additional curricular options)

Challenges: Emergent themes

► UMA loss of autonomy/identity.
► Institutional compatibility
► Faculty/staff integration
► Transferability issues
► Consistent level of student services
► Change in fee structures

IV. CURRENT STATUS & GOALS FOR NEXT STEPS

In March, 2005 coinciding with the end of Phase I, the Chancellor asked Presidents Lyons and Pattenaude to suspend work on this initiative pending further discussions with the legislature and the community. Subsequent to that and with the establishment of the Governor’s Task Force to Plan for Higher Education in Kennebec Valley, further work on SD #8 – UMA/USM Integration has been suspended in order to await the outcome of the Governor’s Task Force completion date December, 2005.

*Detailed appendices of the Committee’s work are available upon request.*