Board of Trustees
Strategic Planning Committee
August 29, 2022 at 8:00 am
Zoom Meeting – No Physical Location Available

The public is invited to view the meeting on YouTube. The link to the Board of Trustees YouTube page can be found on the Board website: https://www.maine.edu/board-of-trustees/

AGENDA

8:00am – 8:15am
Opening Remarks from Committee Chair and Committee Member Introductions

8:15am – 8:20am
Tab 1 – Transition from Ad Hoc Committee to Standing Committee

8:20am – 9:50am
Tab 2 – UMS Strategic Planning Process Update
  • UMS Strategic Planning Process to Date
  • Review and Discuss Themes and Preliminary Goals
  • Proposed Strategic Planning Fall Activities and Timeline

9:50am – 10:00am
Closing Remarks from Committee Chair

Action items within the Committee purview are noted in green.
Items for Committee decisions and recommendations are noted in red.

Note: Times are estimated based upon the anticipated length for presentation or discussion of a particular topic. An item may be brought up earlier or the order of items changed for effective deliberation of matters before the Committee.
AGENDA ITEM SUMMARY

NAME OF ITEM: Transition from Ad Hoc Committee to Standing Committee

INITIATED BY: Emily Cain, Chair

BOARD INFORMATION: X BOARD ACTION:

BOARD POLICY:

UNIFIED ACCREDITATION CONNECTION: n/a

BACKGROUND:
The Board of Trustees approved the establishment of the Strategic Planning Committee as a standing committee of the Board and discharged the Ad Hoc Committee on Strategic Planning at the July 11, 2022 Board meeting. Trustee Emily Cain will serve as chair of the Strategic Planning Committee and the committee membership has been developed. Chair of the Board, Trustee Trish Riley will provide details about the transition from Ad Hoc Committee to Standing Committee.

The Committee meeting on August 29th will be an opportunity to provide information to all Committee members about the role of the Committee and a review of the strategic planning process to date. Below are website links to materials to assist Committee members with historical information relating to the Strategic Planning Process.

**UMS Strategic Planning website**

**UMS Data Book**

**Ad Hoc Committee on Strategic Planning meeting minutes & meeting materials**

<table>
<thead>
<tr>
<th>Date</th>
<th>Minutes</th>
<th>Meeting Materials</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 20, 2022</td>
<td>minutes</td>
<td>meeting materials</td>
</tr>
<tr>
<td>April 20, 2022</td>
<td>minutes</td>
<td>meeting materials</td>
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<tr>
<td>March 21, 2022</td>
<td>minutes</td>
<td>meeting materials</td>
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<tr>
<td>February 23, 2022</td>
<td>minutes</td>
<td>meeting materials</td>
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<tr>
<td>January 19, 2022</td>
<td>minutes</td>
<td>meeting materials</td>
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<tr>
<td>December 16, 2021</td>
<td>minutes</td>
<td>meeting materials</td>
</tr>
<tr>
<td>October 20, 2021</td>
<td>minutes</td>
<td>meeting materials</td>
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</tbody>
</table>

8/22/2022
AGENDA ITEM SUMMARY

NAME OF ITEM: UMS Strategic Planning Process Update

INITIATED BY: Emily Cain, Chair

BOARD INFORMATION: X

BOARD POLICY:

UNIFIED ACCREDITATION CONNECTION: n/a

BACKGROUND:

Huron Consulting Group will join the Strategic Planning Committee meeting on August 29th for a discussion on the following items:

- UMS Strategic Planning Process to date
- Proposed strategic planning fall activities and timeline
- Review and discuss themes to date and preliminary goals
UMS Strategic Planning
Board Strategic Planning Committee: 8/29/2022
Huron Project Team

Peter Stokes
Managing Director

Cathy Dove
Senior Director

Brenna Casey
Project Manager

Kate Gerbode-Grant
Senior Associate
Topic 1

Review of Strategic Planning Objectives and Outcomes
What is system strategic planning?

As the needs for the State of Maine evolve, so should the University Maine System. As the largest provider of higher education in the state, it is critical that the system leverage their combined assets to respond to the changing needs of the state in order to support a thriving economy and higher education system. System Strategic Planning aims to:

- Establish a vision and set of priorities that respond to the current and future economic and community development need and aspirations of the state that account for the distinct contribution of each university and unites the system on broad objectives and outcomes.

- Enable collaborative, creative thinking across diverse stakeholder groups (e.g., Board, Presidents, faculty, staff, students, alumni) in the system that requires imagination and a willingness to develop transformative ideas for a new era.

- Provide a lens through which universities see themselves as channels to serve diverse learner audiences in service of statewide needs supported by optimizing system-wide assets to deliver tailored academic programs.

- Foster an opportunity for the system and its universities—both together and independently—to reflect and consider how to deliver the highest quality postsecondary education to support the personal and professional aspirations of learners.

- Result in cultural alignment, team unification, system-wide partnership, and ultimately, a commitment from all system stakeholders to achieve the vision collectively.

An important aspect of system strategic planning is defining and communicating the role of the system office.
Aligning on a shared view of strategic planning benefits

Outputs and Outcomes

Outputs
- A strategic plan document(s)
- An implementation roadmap
- A project management approach
- A communication strategy
- A repository of ideas

Outcomes
- A shared view of priorities and what to start/stop/continue doing
- Parameters for decision-making
- Shared values and reinforced culture through effective communication and demonstration of accountability and effective execution

Relevance and Impact

Leveraging the possibilities created with unified accreditation

Current landscape demands: As the nation nears the third year of the pandemic and federal funding initiatives conclude in parallel with changing demographics and current economic conditions, we enter a crucial moment in time for colleges, universities and systems to think critically about their future sustainability and impact with respect to education, research and economic development.

Risks of Inaction
- Worsening financial pressures
- Increased competition for prospective students
- Encroachment from competitors

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## Dual Transformation Methodology

<table>
<thead>
<tr>
<th>Present-Forward</th>
<th>Future-Back</th>
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<tbody>
<tr>
<td><em>(1-3 Years)</em></td>
<td><em>(7-10 Years)</em></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Present-Forward (1-3 Years)</th>
<th>Future-Back (7-10 Years)</th>
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</thead>
<tbody>
<tr>
<td>What is</td>
<td>Assumptions-driven</td>
</tr>
<tr>
<td>Continuous</td>
<td>Questions</td>
</tr>
<tr>
<td>Concrete and predictive</td>
<td>Clean sheet</td>
</tr>
<tr>
<td>Delivery/managerial</td>
<td>Systems thinking</td>
</tr>
<tr>
<td>Analytical</td>
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</table>

- Facts- and data-driven
- Answers
- Build off base
- Point solutions
## Strategic Planning Taxonomy

Strategic plans are commonly structured around the following elements, and the content of a plan can be populated by addressing the key questions associated with each element.

<table>
<thead>
<tr>
<th>Element</th>
<th>Questions</th>
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</thead>
<tbody>
<tr>
<td>Mission, Vision, Values</td>
<td>• What is the enduring mission or purpose of UMS?</td>
</tr>
<tr>
<td></td>
<td>• Towards what end(s) should effort and resources be directed?</td>
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<tr>
<td></td>
<td>• What are the values that inform UMS’s mission and vision?</td>
</tr>
<tr>
<td>Emerging Priorities</td>
<td>What key areas of activity will help UMS realize our vision?</td>
</tr>
<tr>
<td></td>
<td>Note: Vertical and horizontal priorities will be features of the strategic plan. Vertical priorities are characterized as discrete or distinct lanes of activity to realize our vision. Horizontal priorities are characterized as cross-cutting areas of action that will infuse multiple verticals to help realize our vision.</td>
</tr>
<tr>
<td>Opportunity Statement</td>
<td>Taking both the UMS’s current strengths and the future market environment into consideration, why should UMS focus on this area?</td>
</tr>
<tr>
<td>Proposed Goals</td>
<td>What outcome are we trying to achieve?</td>
</tr>
<tr>
<td>Initiatives</td>
<td>What are the specific actions that will help us accomplish our goals?</td>
</tr>
<tr>
<td>Measures and Enablers of</td>
<td>• How will UMS know it has succeeded?</td>
</tr>
<tr>
<td>Success</td>
<td>• What role can the UMS office play in enabling system-wide strategic priorities?</td>
</tr>
</tbody>
</table>
Example strategic priority, initiatives, and measures

<table>
<thead>
<tr>
<th>Strategic Priority</th>
<th>Student Experience and Success</th>
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</thead>
<tbody>
<tr>
<td>Initiatives</td>
<td></td>
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<tr>
<td>• Foster Equity and Inclusion to Advance Student Achievement</td>
<td></td>
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<tr>
<td>• Cultivate Student Potential</td>
<td></td>
</tr>
<tr>
<td>• Advance Teaching and Mentoring to Increase Student Success and Well-Being</td>
<td></td>
</tr>
<tr>
<td>• Increase Coordination to Provide Equitable Support and Experiences</td>
<td></td>
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<tr>
<td>• Innovative Delivery Methods and Interdisciplinary Programs</td>
<td></td>
</tr>
<tr>
<td>Measures and Outcomes</td>
<td></td>
</tr>
<tr>
<td>• Diversity of students, faculty, and staff</td>
<td></td>
</tr>
<tr>
<td>• Student satisfaction surveys</td>
<td></td>
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<tr>
<td>• Student outcomes (e.g., graduation rate, job placement)</td>
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<tr>
<td>• Level of alumni engagement with UMS institutions (e.g., donations, event attendance, etc.)</td>
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</tr>
<tr>
<td>• Percentage of students exposed to experiential learning, cross-cultural experiences, or other high-impact practices</td>
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<tr>
<td>• Percentage of faculty pursuing professional development related to teaching and learning and diversity, equity, and inclusion</td>
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Topic 2

Proposed Fall Activities and Timeline
Strategic Planning Timeline Update and Next Steps

**Initiate Project & Build Shared Knowledge Base**
- Winter 2022

**Blueprint the Future State**
- Spring-Summer 2022

**Walk the Future Back as We Begin Drafting the Plan**
- Summer-Fall 2022

**Draft the Strategic Plan**
- Fall 2022-Winter 2023

**Socialize the Strategic Plan**
- Spring-Fall 2023

### Summer 2022 Activities:
- Presented initial findings at May Board of Trustees meeting
- Facilitated an in-person Strategic Planning Working group meeting
- Engaged external stakeholders (5 interviews, 2 focus groups completed as of 8/10)
- Synthesized all stakeholder input to date (e.g., interviews, focus groups, spring university visits, anonymous feedback)
- Developed detailed plans for fall engagement

### Important Next Steps
- Return to each university community to continue the dialogue and engage more deeply following the spring university visits
- Affirm a shared understanding of context and implications leveraging the Data Book
- Identify and discuss a set of opportunities related to academic innovation, operational efficiencies, people, and culture
Strategic Planning Timeline Update: Planned Fall Activity

August
- Board Strategic Planning Committee

September
- President’s Council re-boot series (potential for in-person)
- Strategic Planning Working Group
- University and Law School Visits

October
- University and Law School Visits

November
- President’s Council
- Strategic Planning Working Group
- Board Strategic Planning Committee
- Board Meeting (11/14)

December
- Board of Trustees Retreat (12/4-5)

Fall 2022 Activities:
- Assess emerging priorities and initiatives to identify gaps
- Develop universe of strategic options and test hypotheses
- Draft emerging strategic plan pillars
- Complete system office benchmarking research
- Update new BOT members on strategic planning work to date
- Plan fall university and Law school visits
Planned Fall Stakeholder Engagement

Huron proposes a 2-day visit (independent of the system office) to each of the eight universities to facilitate stakeholder engagement, independent of the system office. Engagement sessions could include the following groups.

We propose a three-step approach with each group to:

**Listen. Inform. Envision.**

Listen to concerns and challenges, inform about the current realities facing the System, and ultimately, inform a future vision for UMS.

Conduct numerous sessions with various stakeholders at each university visit. Stakeholders will participate in a session tailored to each audience and be invited to a culminating session where Huron will summarize and reflect what we’ve heard, including emerging ideas.

Ensure the iterative process provides appropriate context for each stakeholder group to ensure an understanding of the current state and the opportunity to articulate desired outcomes for a future state.
President’s Council Fall Engagement

Huron recommends increased engagement with the PC to ensure University presidents are fully engaged in all steps of the planning process and development of the future vision.

- We propose a series of meetings that is essential for coalescing around critical matters and to continue discussing important issues in an informal setting while addressing immediate concerns and endorsing a vision for the future.

- We recommend an in-person format that spans two days to cover the first two meeting topics together, including an evening social event to garner full-attendance.
Topic 3

Review themes to date and preliminary goals
In this document, we have synthesized our key takeaways from our UMS data analysis, internal/external stakeholder engagement, and market research to develop a perspective on opportunities for the UMS. We have framed these opportunities using eight overarching Strategic Priorities, with several Potential Goals nested under these eight areas.
Data Book Contents

To develop a robust understanding of the current UMS ecosystem, some topics demand broader analysis to understand their full complexity and relationship to and within the System (e.g., student enrollment and financial health).

**Enrollment and Demographics**
- Maine high-school graduates pie chart, broken down by future pathway
- UMS Enrollment by university over time
- Enrollment Demographics
- UMS Aggregate Enrollment broken down by in-state/out-of-state and residential/commuter/online
- Adult Learner Opportunity and Overview

**Academics and Student Success**
- US, Northeast and Maine Completion Rates over time
- Completion Demographics
- Community College Transfer Student Success
- Student Migration Post-Graduation
- Academic Portfolio across the System, Undergraduate and Graduate
- Cost to Educate by Credit Hour
- Return on Investment university

**Financials and Personnel**
- Composite Financial Index Comparison
- Staff & Employees by university over time
- Employee Demographics
- Revenues and expenses over time
- State appropriations over time
- Tuition trends over time
- Capital expenditures and deferred maintenance
- Net revenue tuition and fees over time
- Capital Investments over time
- Aging physical plant over time

**Economic Development and Research**
- Maine’s Current and Future Industries
- Maine Occupations for Bachelors, Graduate, and Non-Degrees
- Household Income by Maine County
- UMS Research funding over time

**Higher Education Market Trends and System Benchmarking**
- US, Northeast and Maine Current and Future Demographic Trends
- Access and Affordability trends
- Digital transformation for teaching and learning trends
- Lifelong learning and “Non-traditional” student
- Corporate Partners and Workforce Development
- R&D Priority Areas
- System case studies: UC, SUNY, UW

Note: Data Book contents and slides will be updated or added as needed to reflect the most current information available.
Data Book Implications Summary

Enrollment – The addressable market of traditional students in the U.S. is expected to peak in 2025 and eventually fall below 2015 levels by 2035. Maine graduates are projected to decline gradually from 2022-2035 and projected to remain nearly 10% below 2025 levels, a trend currently impacting UMS with 23% fewer students enrolling system-wide for the fall semester in 2022 compared to 2021. Along with continued demographic shifts, UMS can anticipate changing students’ needs, future challenges related to college readiness, and ability to pay reinforcing the need for UMS to remain affordable.

Academic – The pandemic has also accelerated the digital transformation for teaching and learning. UMS can continue to facilitate digital transformation throughout the System while also supporting increased flexibility in program delivery to meet learners’ needs and expectations.

Economic – UMS can shape Maine’s future economy by investing in initiatives to drive new job and industry growth while producing a credentialed workforce to meet those needs. Within its current academic portfolio, the System can address the immediate needs of healthcare and education worker shortages while planning to meet future needs.

Research – UMS’s current assets and expertise are well-positioned to broadly address federal research priorities in areas like climate change, technologies that support economic resilience such as biobased alternatives, and artificial intelligence that are also in alignment with the Maine Economic Development Strategy through 2029.

Financial – The decline in tuition revenue combined with aging infrastructure, and annual state appropriations negatively impacted by inflation, UMS will benefit from careful, strategic resource planning that enables the System to flex to meet changing supply and demand over the next decade.
Themes to Date: Internal Stakeholders

Strengths
- State of Maine Assets
- Connectedness
- Signature Attributes
- Affordability
- Research & Development
- Economic & Cultural Engines
- Administrative Integration
- Existing Collaborations

Challenges
- Demographic Declines
- Campus Autonomy vs. “One University”
- Communication & Trust
- Culture & Collaboration
- Scale & Scope
- Fiscal Sustainability
- UMS Brand
- Internal & External Competition

Role of the System Office
- Governance & Shared Resources
- State Advocacy for Higher Education
- Statewide Objectives/Local Solutions

Strategic Priorities
- Research & Economic Development
- Retention, Persistence, Completion
- Cost- Efficiency
- Adult Market
- Workforce Development
- Cross-Collaboration
- Leverage Unique Assets of Maine
- Aging Infrastructure
- Academic Innovation
Themes to Date: External Stakeholders

Strengths to Leverage & Strategic Priorities

- **Workforce** – Stakeholders believe that UMS should lead efforts to fulfill the current and future workforce needs of the state in partnership with employers, state leaders, and advocacy groups by leveraging their varied academic assets to meet workforce needs.

- **Economy** – UMS should align its strategic priorities to the state economic development plan and translate its intellectual property in R&D to attract business to Maine. They should continue to leverage the rural universities as economic anchors.

- **Student Success** – Leverage technology and Unified Accreditation to establish clear and easily navigable pathways to completion for learners at all stages of their degree or credential attainment.

Challenges

- **Communications** – Stakeholders desire consistent, transparent communication between UMS and its partners to foster trust and achieve statewide economic, workforce, and community development objectives. Additionally, UMS must communicate its impact, value, and successes to garner greater fiscal and nonfinancial investment from its citizens.

- **Collaboration** – Stakeholders noted that the system must work collaboratively towards a common set of goals, shift the culture to compete externally, and strategically distribute programs of strength across the system where they are executed most effectively.

Role of the System

- **Vision & Branding** – Stakeholders universally identified the need for a compelling vision and identity that establishes an unmistakable brand for UMS as a unified system composed of distinct universities.

- **Fiscal Sustainability** - The system office should be responsible for fiscally sustaining the system while focusing on collaboration, partnership, and advocacy internally and externally.
## Example Goals by Priority Area

Based on stakeholder feedback, dialogue with the Board Committee, Presidents Council and Strategic Planning Working group, Huron developed an illustrative taxonomy of priorities and goals. Priorities are defined as key areas of activity to help UMS realize their vision and goals are the outcome UMS is trying to achieve.

<table>
<thead>
<tr>
<th>Example Priority Area</th>
<th>Example Goals</th>
</tr>
</thead>
</table>
| Access, Affordability, & Learner Success          | • Build a pipeline to education with multiple points of entry in Maine that extends from birth to retirement years to improve the lives of all Mainers  
• Offer Maine learners access to a high-quality university education regardless of their financial situation  
• Close gaps to improve student outcomes e.g., retention, persistence, completion rates, that will provide learners with the tools to thrive in the 21st-century workforce |
| Academic Innovation & Collaboration               | • Boldly innovate undergraduate, graduate and lifelong education for a dynamic, digital, and global future  
• Build on the UMS culture of collaboration by investing in infrastructure that propels innovation through joint endeavors  
• Make the state of Maine an attractive place to live, learn, and work by leveraging the state of Maine assets through academic, research, and experiential learning opportunities |
| Workforce & Economic Development                  | • Drive economic development through the alignment of educational opportunities with state and global workforce needs  
• Create a clear and supported pathway to a credential of value for every Maine citizen |
| Interdisciplinary Research                        | • Evolve a collaborative and interdisciplinary research culture that advances innovative practices in learning, research, discovery, and knowledge transfer  
• Maximize research investment to attract new industries and talent to Maine |
| Financial Sustainability                          | • Ensure the financial strength of the System through sustainable and leading-edge financial models supported by effective financial management practices |
Example Goals by Priority Area

Based on stakeholder feedback, dialogue with the Board Committee, Presidents Council and Strategic Planning Working group, Huron developed an illustrative taxonomy of priorities and goals. Priorities are defined as key areas of activity to help UMS realize their vision and goals are the outcome UMS is trying to achieve.

<table>
<thead>
<tr>
<th>Example Priority Area</th>
<th>Example Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operational Excellence</td>
<td>• Optimize delivery of programs and services through the systemwide implementation of best practices that maximize resources</td>
</tr>
<tr>
<td></td>
<td>• Make UMS a top destination to learn, work, research, and thrive by strengthening and strategically positioning our brand</td>
</tr>
<tr>
<td></td>
<td>• Maximize our physical assets to expand access to educational opportunities to all Maine citizens</td>
</tr>
<tr>
<td></td>
<td>• Develop a compelling, clear-cut brand for UMS as a unified system composed of distinct universities</td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>• Ensure the financial strength of the System through sustainable and leading-edge financial models supported by effective financial management practices</td>
</tr>
<tr>
<td>Diversity, Equity, &amp; Inclusion</td>
<td>• Attract, develop, and retain diverse, highly productive, talented and motivated professionals and students who embody our core values and commit to a culture of equity and inclusion</td>
</tr>
<tr>
<td></td>
<td>• Optimize the use of existing physical and technological infrastructure to provide an inclusive and accessible place to live, learn, and work</td>
</tr>
<tr>
<td>Environmental Sustainability</td>
<td>• Become a national leader in sustainability standards across research, teaching, and scholarship</td>
</tr>
<tr>
<td></td>
<td>• Prepare graduates to make tangible, positive contributions to addressing the world’s environmental challenges</td>
</tr>
</tbody>
</table>

Are these the right preliminary Strategic Priorities and goals for the system’s next strategic plan?

Are there any important priorities that are not yet sufficiently emphasized or still missing?
Appendix
## Stakeholder Engagement

### Internal Stakeholders

- Jeff St. John, UMS Associate Vice Chancellor Accreditation and Strategic Initiatives
- Dan Demeritt, UMS Senior Executive Director of Marketing and Communications
- Ryan Low, UMS Vice Chancellor for Finance and Administration
- Rosa Redonnett, UMS Associate Vice Chancellor Student Success and Credential Attainment
- Robert Placido, UMS Vice Chancellor Academic Affairs & Carolyn Dorsey, Associate Vice Chancellor Academic Affairs
- Joan Ferrini-Mundy, UM/UMM President & UMS Vice Chancellor Innovation
- UMS Admin/Finance Focus Group (General Counsel, CIO, CHRO, DOE, VC Finance)

### External Stakeholders (To Date)

- VisionPoint Marketing
- Heather Johnson, Commissioner, ME Dept. Economic/Community Development
- Greg Powell, CEO Harold Alfond Foundation
- John Diamond, President and CEO, UM Alumni Association
- Nate Wildes, Executive Director, Live+Work Maine
- Clif Greim, Board Chair, Maine State Chamber of Commerce
- Martha Johnston, Director of Education, FAME
- Jason Judd, Executive Director, Educate Maine

- Joe Szakas, President, University of Maine Augusta
- Edward Serna, President, University of Maine Farmington
- Deb Hedeen, President, University of Maine Fort Kent
- Ray Rice, President, University of Maine Presque Isle
- Glen Cummings, President, University of Southern Maine
- Leigh Saufley, President, Maine Law
- University and Law School Cabinets
- Student, Staff, and Faculty Focus Groups at each university and Law School

- Rep. Rebecca Millett, House District 30, Cumberland County
- Rep. Teresa Pierce, House District 44, Falmouth (part)
- Rep. Paul Stearns, House District 119, Piscataquis County
- Janet Sortor, VP & CAO, Maine Community College System
- Jared Cash, President/CEO, Mitchell Institute
- Wendy Ault, Executive Director, MELMAC
- Economy Focus Group #2 (upcoming)
- Employer Focus Group (upcoming)
## Stakeholder Themes: Comparison

<table>
<thead>
<tr>
<th>Themes</th>
<th>Internal</th>
<th>External</th>
</tr>
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<tbody>
<tr>
<td><strong>Strengths</strong></td>
<td>• State of Maine Assets&lt;br&gt;• Signature Attributes&lt;br&gt;• Research &amp; Development&lt;br&gt;• Economic &amp; Cultural Engines</td>
<td>• State of Maine Assets&lt;br&gt;• Administrative Integration&lt;br&gt;• Existing Collaborations&lt;br&gt;• Connectedness&lt;br&gt;• Affordability</td>
</tr>
<tr>
<td></td>
<td>• Fiscal Sustainability&lt;br&gt;• UMS Brand&lt;br&gt;• Internal &amp; External Competition&lt;br&gt;• Communication &amp; Trust</td>
<td>• Fiscal Sustainability&lt;br&gt;• UMS Brand&lt;br&gt;• Internal &amp; External Competition&lt;br&gt;• Consistent, Transparent Communication</td>
</tr>
<tr>
<td><strong>Challenges</strong></td>
<td>• Scale &amp; Scope&lt;br&gt;• Demographic Declines&lt;br&gt;• Campus Autonomy vs. “One University”&lt;br&gt;• Culture &amp; Collaboration</td>
<td>• Fiscal Sustainability&lt;br&gt;• UMS Brand&lt;br&gt;• Internal &amp; External Competition&lt;br&gt;• Consistent, Transparent Communication</td>
</tr>
<tr>
<td><strong>Strategic Priorities</strong></td>
<td>• Research &amp; Economic Development&lt;br&gt;• Retention, Persistence, Completion&lt;br&gt;• Cost- Efficiency&lt;br&gt;• Aging Infrastructure&lt;br&gt;• Workforce Development&lt;br&gt;• Cross-Collaboration</td>
<td>• Economic Development&lt;br&gt;• R&amp;D Tech Transfer&lt;br&gt;• Retention/Completion&lt;br&gt;• Statewide Collaboration&lt;br&gt;• Streamline Operations&lt;br&gt;• Aging Infrastructure&lt;br&gt;• Workforce Development/Credential Attainment</td>
</tr>
<tr>
<td><strong>Role of the System Office</strong></td>
<td>• Governance &amp; Shared Resources&lt;br&gt;• State Advocacy for Higher Education&lt;br&gt;• Statewide Objectives/Local Solutions</td>
<td>• Administrative&lt;br&gt;• Collaboration, Partnership, Advocacy&lt;br&gt;• Fiscal Sustainability</td>
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We will facilitate dialogue with stakeholders about the future state vision, taking into account university-specific and system-wide perspectives.

**Sample Questions used in stakeholder engagement**

In what areas should the System be out in front and "pulling," while the institutions follow directives/guidance? In what areas should the institutions be taking the lead, while the System supports?

What are the System’s greatest strengths and challenges, from your perspective? What challenges within the System has the pandemic made more acute? What trade-offs and decisions would enable the System to best play to its strengths?

How do we ensure we are creating a strategic plan that is flexible yet pointed enough for all System institutions to execute on?
“Buy-in” is established through solicitation of input, demonstration that input was incorporated, and socialization of frameworks.
Managing an Enterprise Growth Portfolio

- **Reinvented Core**
  - New Growth (long term)

- **Adjacent (medium term)**

- **Core (short term)**

- **New Growth**
  - Transformational change that represents expansion based on acquired or developed programs and competencies that did not historically exist

- **Adjacent**
  - Branching out to adjacent disciplines and competency areas
  - Expanding to new (interdisciplinary) areas at the spaces between existing disciplines

- **Core**
  - Fortifying or modernizing existing programs and competencies
  - Stop / sunset what no longer drives stakeholder value

**Audience Diversification**