

University of Maine System – Board of Trustees Meeting
May 19-20, 2024
at the University of Maine at Fort Kent

Sunday, May 19, 2024

Call to Order @ 1:30pm

The Board of Trustees will go directly into Executive Session under provisions: 1 MRSA Section 405 6-A, C, D & E.

Executive Session from 1:30 pm to 4:00 pm, Nadeau Conference Room, Nadeau Hall

University of Maine Fort Kent Presentation and Tour of Nursing Interactive Simulation Center,

4:00-5:00 pm

Reception @ 5:15 pm (Cash Bar) – Bengal’s Lair, Cyr Hall

(By Invitation Only)

Dinner @ 6:00 pm – Nowland Hall

(By Invitation Only)

Monday, May 20, 2024

Breakfast served @ 7:00 am – Nadeau Hall

Coffee & Networking @ 8:00 am

Call to Order @ 8:30 am – Nadeau Conference Room

Citizen Comment

Individuals who wish to participate in Citizen Comment must indicate their name and topic on the sign up sheet, which will be available in the meeting room on May 20, 2024 starting at 8:00 am until 8:25am.

The Board of Trustees provides time for citizen comment prior to the business agenda at each meeting. The Chair of the Board will establish time limits (usually three minutes per person) and determine any questions of appropriateness and relevancy. Personnel decisions, collective bargaining issues, grievances, litigation and other areas excludable from public discussion under the Maine Freedom of Access Law shall not constitute appropriate matters for such input. A person who wishes to speak during the citizen comment period should arrive prior to the meeting start time and sign up on a sheet provided, indicating name and topic of remarks.

Approx 8:35 am

Chair’s Report

- **Tab 1 - Chancellor's Contract**
- Student Representative Update
- Presidents’ Round Robin
- Follow Up on Fundraising Report

Tab 2 – Redlined Board Policy First Read

Tab 3 – Conflict of Interest Form Update

Approx 9:30 am

Chancellor's Report

- Chancellor's Update

Tab 4 – University of Maine System 2025 Honorary Degree Nominations

9:40 am

Vice Chancellor for Finance and Administration & Treasurer's Report (50 Minutes)

Tab 5- FY2025 Updated Proposed University and System Office Operating Budget and Student Charges, UMS

Tab 6 – Finance and Administration Update

Tab 7 - Energy Savings Performance Contract (ESPC) Financing, Project and Reimbursement Resolution Authorization, UM

Approx 10:30am.

Tab 8 - Vice Chancellor for Academic and Student Affairs

Tab 9 - Tenure at Time of Hire

Approx 11:00am.

Tab 10 – Vice Chancellor for Strategic Initiatives

Tab 11 - Approval of Collective Bargaining Agreement, Police/FOP

Approx 11:30 am

Vice Chancellor for Research and Innovation (10 Minutes)

Approx. 11:40 pm

Lunch Break (Timing of the lunch break will be at the discretion of the Chair)

Approx. 12:15

Action Items –

Tab 12 - Election of Board Officers (Trustee McMahon)

Tab 13 – Confirmation of Student Representatives

Approx. 12:40 pm

Consent Agenda

Tab 14 - Acceptance of Minutes

Tab 15 – New Academic Program Proposal – Doctor of Engineering in Engineering Technology, UM JV

Tab 16 – New Academic Program Proposal – Master of Arts in Teaching – Whole Child Education, UMA

Tab 17 – New Academic Program Proposal – Associate of Arts in Social Science, UMA

Date of the Next Meeting:

July 14-15, 2024, meeting will be held at the University of Maine.

Public Meeting conclude at approximately 12:50 pm.

Executive Session – following the public meeting, if needed

Reports

[Agenda Calendar](#)

Tabs noted in red text are action items.

Note: Times are estimated based upon the anticipated length for presentations 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 Board.

Subject: May 2024 Board Meeting Logistics for Trustees

The May 2024 Board meeting will be held in person at the University of Maine at Fort Kent. Parking is in the Cyr Hall Lot. (23 University Drive).

Below is an abbreviated schedule for you.

SUNDAY, May 19 AGENDA

There will be a lunch provided for Trustees prior to entering Executive Session.
Lobby outside Nadeau Conference Room, Nadeau Hall.

The start time for Executive Session is 1:30 pm.
The estimated end time for Executive Session is 4:00 pm.

Coffee and Refreshments will be provided throughout Executive Session.

4:00pm - University of Maine Fort Kent Presentation and Tour of Nursing Interactive Simulation Center

5:15pm – 6:00pm - Reception (Bengal's Lair, Cyr Hall)

6:00pm - Dinner (Nowland Hall)

If you requested a hotel reservation, your room is reserved at Northern Door Inn, 356 West Maine Street, Fort Kent, ME 04743. Check in at 3:00pm.

MONDAY, April 8 AGENDA

The Alumni Conference Room has been reserved for Faculty and Student Rep Meetings – which is down the hall from the Nadeau Conference Room

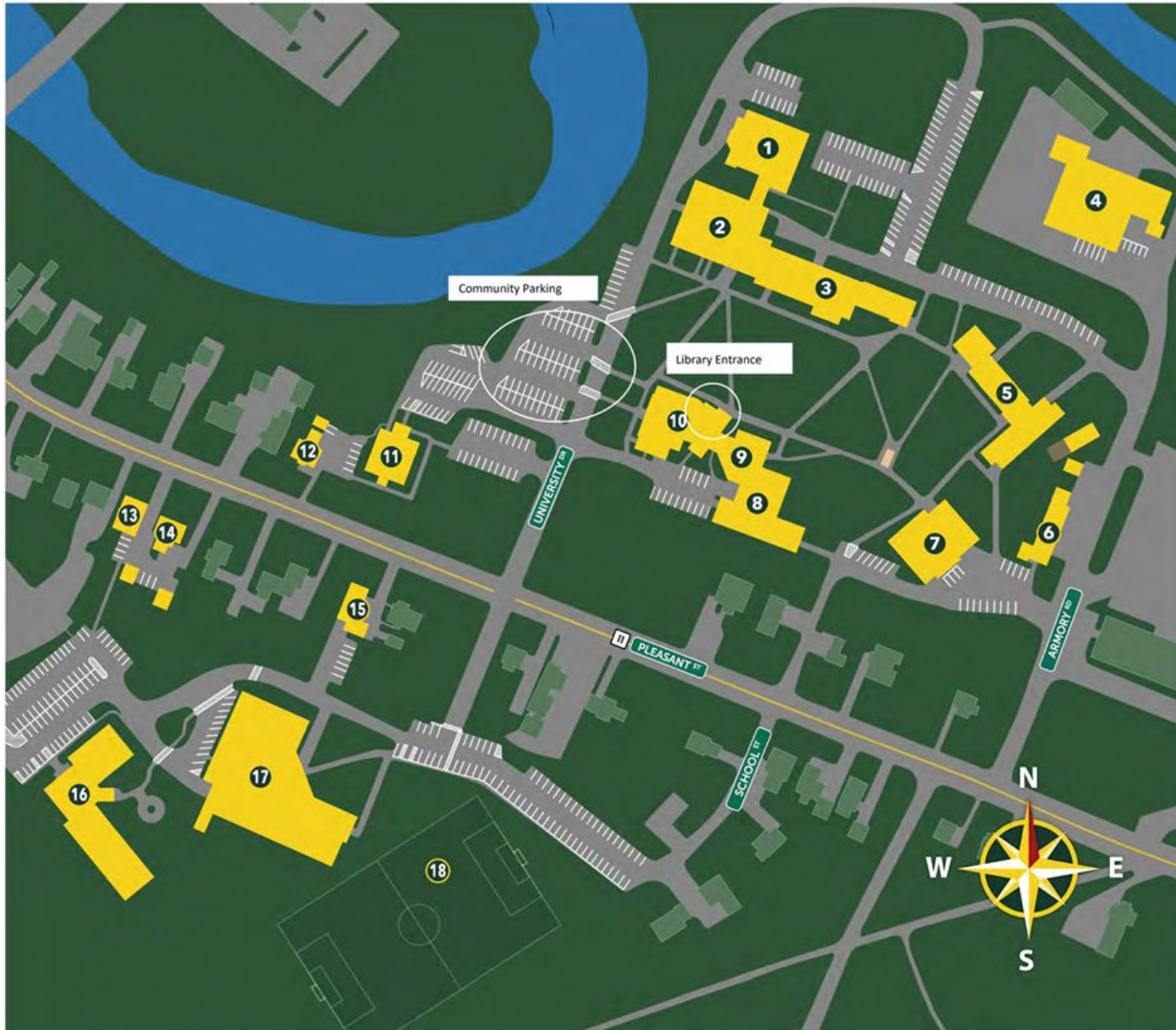
7:00am – 8:30am - Breakfast & Networking – Outside Nadeau Conference Room, Nadeau Hall

8:30am – 2:00pm - Public Meeting - Nadeau Conference Room, Nadeau Hall

Executive Session Following the Public Meeting if needed.
Nadeau Conference Room, Nadeau Hall

Please let us know if you have any questions or need any additional information.

Kayla Flewelling – Personal – (254) 289-0495 Clerk's Office (207) 581-5840



Campus Map

Map Legend

- 1 Nadeau Hall
- 2 Fox Auditorium
- 3 Cyr Hall
- 4 Armory Building
- 5 Crocker Hall
- 6 Physical Plant
- 7 Nowland Hall
- 8 Powell Hall
- 9 Acadian Archives
- 10 Blake Library
- 11 Old Model School
- 12 Madawaska House
- 13 Haenssler Honors Ctr.
- 14 Acadia House
- 15 St. David House
- 16 The Lodge
- 17 Sports Center
- 18 Alumni Memorial Field



Scan this code for directions
to our campus

University of Maine System
Board of Trustees

AGENDA ITEM SUMMARY

NAME OF ITEM: Chancellor Malloy's Contract

INITIATED BY: Patricia A. Riley, Chair

BOARD INFORMATION: **BOARD ACTION:** X

BOARD POLICY:

UNIFIED ACCREDITATION CONNECTION:
N/A

BACKGROUND:

Dannel Malloy was appointed Chancellor of the University of Maine System effective July 1, 2019. The Board of Trustees will discuss the Chancellor's contract in executive session under provision 1 MRSA Section 405 6-A, at the May 19-20, 2024 Board meeting.

TEXT OF PROPOSED RESOLUTION:

A resolution will be presented at the May 19-20, 2024 Board meeting.

5/12/2023

University of Maine System
Board of Trustees

AGENDA ITEM SUMMARY

NAME OF ITEM: Proposed Change to Board of Trustee Policies 207 - 211

INITIATED BY: Patricia A. Riley, Chair

BOARD INFORMATION: X

BOARD ACTION:

BOARD POLICY: Section 103 Bylaws

UNIFIED ACCREDITATION CONNECTION: N/A

BACKGROUND:

At the direction of Chair Riley and agreement of the Board at the January 2023 meeting, the Bylaws Working Group has completed its review of the current Bylaws and recommended the changes noted in the redline format included in meeting materials. It has been the intent of the Working Group throughout this process to clarify the current wording of the Bylaws, add necessary details to reflect ongoing Board practice, and to include content in the Bylaws derived from our Charter and other operating principles where it was determined that language was important to include.

These initial provisions and redlined changes are being presented as an information item at the May 2024 Board of Trustees Meeting for consideration and further recommendations. The proposed Bylaw changes will be presented at the July 2024 Board of Trustees for final approval.

Attachments

[Bylaws Working Group Report/Cover Letter](#)

[Board Policy 207 – Signatory Authorization](#)

[Board Policy 208 – Logos and Trademarks](#)

[Board Policy 210 – Legal Affairs](#)

[Board Policy 211 – The Maine Prize](#)



Board of Trustees
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Tel: 207-581-5840

www.maine.edu

The University of Maine

University of Maine
at Augusta

University of Maine
at Farmington

University of Maine
at Fort Kent

University of Maine
at Machias

University of Maine
at Presque Isle

University of
Southern Maine

University of Maine
School of Law

May 7, 2024

TO: UMS Board of Trustees

FM: Report and Recommendations from the Policy Review Subgroup: First Reading of Policy Amendments

Your Policy Review Subgroup, composed of myself, Trustee Lisa Marchese Eames, Trustee Patrick Flood, and with the assistance of the Board Clerk Elizabeth Stickler and General Counsel Paul Chan, have reviewed the following Board Policies and propose the following redline changes for your review at the May Board of Trustees Meeting. Following comments and input from the Board and members of the public, we will bring these policies forward for final adoption at the July BOT meeting.

Section 207: Signatory Authorities: We have identified the Responsible Office as the Treasurer and eliminated the obligation to obtain the approval of the Chair of the Board or the Chair of the Finance Committee for the Treasurer to take the identified actions, all of which are within his/her regular duties.

Section 208: Logos and Trademarks: We propose to use the current term of "General Counsel" throughout these policies.

Section 210: Legal Affairs Policy: We propose to use the current term of "General Counsel" throughout these policies. We also delete a reference to an Administrative Procedures document that does not appear to exist.

Section 211: The Maine Prize: While there has been some consideration given to eliminating this policy due to the lack of implementation, we recommend that the policy continue with the amendment that it will be awarded at the discretion of the Board of Trustees.

We reviewed several policies and do not make any recommendations for change:

Section 209: Intellectual Property

Section 213: Honorary Degrees

We are currently considering Sections 212, 214, and 215 and hope to have our recommendations for change, if any, for the July Board meeting.

We welcome your consideration and comments.

Sincerely,

Barbara Alexander, Member, Board of Trustees

UNIVERSITY OF MAINE SYSTEM

Policy Manual

GOVERNANCE AND LEGAL AFFAIRS

Section 207 Signatory Authorities

Effective: 1/25/78

Last Revised: 7/19/78; 5/23/11; 7/18/11

Responsible Office: Treasurer ~~Clerk of the Board~~

Policy Statement:

The Treasurer of the University of Maine System is:

- 1) Authorized to grant to designated officers and employees of the University of Maine System the authority
 - (a) to sign checks drawn on bank accounts of the University System, drafts, acceptances or other instruments on such specific purposes, within such specific limits, and upon such terms and conditions as the Treasurer shall establish from time to time; and
 - (b) to sign contracts, grant applications, research proposals, purchase orders and similar instruments on behalf of the University System in the regular course of the operation of the institution for such specific limits, and upon such terms and conditions as the Treasurer shall establish from time to time; and
- 2) Authorized to revoke and modify any authority so granted.
- 3) All such grants of authorities shall be approved in advance by the Treasurer and shall be kept current and on file in the Treasurer's Office.

The Treasurer, ~~the Chair of the Board of Trustees, or the Chair of the Finance Committee~~, with the approval of the Board of Trustees, may sell, assign, and transfer any and all securities owned by or standing in the name of this corporation; execute proxies, consents, deposit and protective agreements, and perform such other acts as may be essential to the expeditious administration of the endowment funds and other securities of the corporation and the rights and duties incident thereto.

Related Documents:

Administrative Practice Letter Section IV - C: Signature Authority

UNIVERSITY OF MAINE SYSTEM

Policy Manual

GOVERNANCE AND LEGAL AFFAIRS

Section 208 Logos and Trademarks

Effective: 11/18/85

Last Revised: 1/29/90

Responsible Office: General Counsel ~~University Counsel~~

Policy Statement:

It shall be the policy of the University of Maine System to declare openly and profess its ownership of the seals, service marks, logos and trademarks, and any combination thereof, contained in the System's Trademarks Book, to protect and defend its exclusive ownership thereof, to limit and restrict all use adverse to the University of Maine System, and to limit and control other use by third parties thereto through proper licensing agreements. The System's Trademarks Book shall be on file in the Office of University General Counsel.

Related Documents:

UMS Board of Trustees Policy:

Section 706 Acceptance of Gifts, Development Activities & Fund Raising Campaigns

UNIVERSITY OF MAINE SYSTEM

Policy Manual

GOVERNANCE AND LEGAL AFFAIRS

Section 210 Legal Affairs Policy

Effective: 5/20/96

Last Revised:

Responsible Office: General University Counsel

Policy Statement:

The University of Maine System is a corporate and independent legal entity created by and organized under the private and special, and public laws of the State of Maine and as such may sue and be sued only in its corporate capacity as the University of Maine System.

The University of Maine System's need for legal advice has expanded significantly in recent years resulting from the growth of federal and state regulation of higher education, advances in technology, the complexity of employment relationships and student expectations, expansion of cooperative and business relationships with third parties, burgeoning entrepreneurial opportunities and the increased litigiousness of society in general. To effectively and uniformly respond to legal matters, review and management of these matters must be handled centrally. Therefore, all legal advice significantly affecting the legal position of the University of Maine System shall be provided by the General University Counsel acting in his/her role as legal counsel to the University of Maine System or by outside counsel authorized by University General Counsel.

~~Related Documents:~~

~~Administrative Procedures on Legal Matters~~

UNIVERSITY OF MAINE SYSTEM

Policy Manual

GOVERNANCE AND LEGAL AFFAIRS

Section 211 The Maine Prize

Effective: 1/29/90

Last Revised:

Responsible Office: Clerk of the Board

Policy Statement:

The public university of the State of Maine has a particular responsibility to recognize exceptional distinction, not only in its graduates but also in the larger community. Accordingly, to honor persons of renown and national stature who have strong ties to Maine, the Board of Trustees hereby creates *The Maine Prize*, An Award of the University of Maine System.

Procedures:

Periodicity. Ordinarily, The Maine Prize ~~is may be to be~~ awarded at the discretion of the Board of Trustees once every three years.

Eligibility. The intent of the Board is to avoid rigid requirements and frame the terms of eligibility broadly. The only fixed requirement is that the awardee be living at the time the selection of the recipient is made.

The awardee necessarily will have a strong Maine connection, although neither native birth, State residency, nor graduation from a University System campus is required. The nature of the Maine connection could be manifested in significant contributions to the welfare of the State, for instance, or the awardee might be a Maine person who has made important contributions to the national or international welfare.

There is no restriction on the range of professions deemed appropriate to a suitable awardee. Indeed, it is possible that an eminently qualified individual might have pursued no formal career at all.

Process of Selection. The Chair of the Board will appoint a committee of two Trustees and three members from outside the University System. In addition, the Chancellor will serve ex officio, and the Board's staff will be responsible for providing the necessary secretariat function. The Committee may entertain nominations from as broad a span of sources as it considers appropriate. Its recommendations will be made to the Board of Trustees, which will make the final decision on recipients.

The Award. The Maine Prize consists of an appropriately inscribed plaque and a monetary award of \$10,000.

The Ceremony. The Award will be presented in a major University convocation. The focal point of the ceremony would be a formal address by the recipient of the award and a suitable publication that includes a written edition of the address will provide a record of the event. Usually, the ceremony

will take place on one of the Campuses of the University System with the choice having some relevance to the awardee, if possible. The repetitive selection of any one campus is to be avoided.

University of Maine System
Board of Trustees

AGENDA ITEM SUMMARY

NAME OF ITEM: Conflict of Interest Form Update

INITIATED BY: Patricia A. Riley, Chair

BOARD INFORMATION: X

BOARD ACTION:

BOARD POLICY:

Section 206 Board of Trustees: Ethics Code and Conflict of Interest

UNIFIED ACCREDITATION CONNECTION:

N/A

BACKGROUND:

At the direction of Chair Riley and agreement of the Board of Trustees at the January 2023 meeting, the Bylaws Working Group has completed its review of the Conflict-of-Interest Form and will be briefed by Deputy General Counsel Amon Purinton on its current status.

Attachment
[Conflict of Interest Form](#)

Financial Disclosure Form

* PLEASE RETURN BY _____ *

Policy Statement: Section 206 Board of Trustees – Ethics Code and Conflict of Interest

A Trustee has a potential conflict of interest when an action by the University of Maine System, whether isolated, recurring or continuous, is to the financial or other advantage of the Trustee, the Trustee's employer or client, the Trustee's spouse, parent, or child..¹

Maine law also provides that trustees shall not have a direct or indirect pecuniary interest in any contracts made by the System..²

Upon becoming aware of any potential conflict of interest each Trustee shall declare that conflict at the earliest opportunity and either eliminate the conflict or refrain from debate and discussion at Board Committee meetings or Board meetings unless invited to participate by a majority vote of the Board Committee or by the Board. Further, the Trustee shall register an abstention when a vote is taken on the matter by the Board or Board Committee..³

Instructions

Each Trustee, upon appointment to the Board, and, as a minimum, for each Annual Meeting thereafter, shall file this Financial Disclosure Form with the Clerk of the Board..⁴

This questionnaire asks about potential conflicts for the period between July 1, 20__ and June 30, 20__ in the following categories:

- Conflicts of interest
- Interests in any contracts made with the System
- Real and personal property
- Personal liabilities
- Positions of Trustees and their spouses

Please contact _____ if you have any questions about completing this questionnaire.

Elizabeth
Paul

¹ Board of Trustees Policy Manual Sec. 206; <https://www.maine.edu/board-of-trustees/policy-manual/section-206/>, Attached as Appendix A.

² 17 MRSA Sec. 3104, Attached as Appendix B.

³ Policy Manual Sec. 206.

⁴ *Id.*

Financial Disclosure Form**A. Conflicts of interest****1. Pecuniary interests:**

- i. Do you, your spouse, your parents, or any of your children have any business transactions with the System, including but not limited to:
- contracts of sale or performance of services
 - leases
 - licenses
 - joint ventures, whether new or ongoing

No _____ Yes _____ If Yes, please attach details [include for each question]

- ii. Did you, your spouse, your parents, or any of your children conduct a business transaction with the System for which payment was made during the year ended June 30, 20____?
- iii. Do you, your spouse, your parents, or any of your children have an ownership interest in a company that conducted a business transaction with the System for which payment was made during the year ended June 30, 20____?
- iv. Do you, your spouse, your parents, or any of your children serve as an officer, director, trustee, employee, partner, or member of a business entity, or shareholder of a professional corporation that is involved in a business relationship with the System for which payment was made during the year ended June 30, 20____?
- v. Was your spouse, your parents, or any of your children employed by the System during the year ended June 30, 20____?
- vi. Do you, your spouse, your parents, or any of your children have a trust, escrow, or custodial arrangement with the System?

2. Grants or Assistance

- i. Did you, your spouse, your parents, or any of your children receive any grants or other assistance from the System during the year ended June 30, 20____?
- ii. Were you, your spouse, your parents, or any of your children a substantial contributor to the System or to any entity that contributes substantially to the System during the year ended June 30, 20____?
- iii. Are you, your spouse, your parents, or any of your children a member of a selection committee with any organization that grants money to or receives funds from the System?

3. Relationships Among Trustees, Officers, and Employees

- i. Did you have a family relationship with an officer or employee of the System at any time during the year ended June 30, 20____?
- ii. Did you, your spouse, your parents, or any of your children have a business relationship with a System officer or employee at any time during the year ended June 30, 20____?

Financial Disclosure Form

3.1

4. Other Matters

- i. Is there any other instance where you, your spouse, your parents, or any of your children has an actual or apparent conflict of commitment or interest between your System obligations and an outside interest, which does not fit into any of the above questions?
- ii. While this questionnaire focuses on the fiscal year just ended, it is best to address potential conflicts in advance. Do you have any anticipated or known conflicts that may or will arise for future years' reporting?

B. Real and personal property: Please report the real and personal property owned by you, your spouse, and your minor children with a value of one hundred thousand dollars (\$100,000) or more. The homestead, household furnishings, personal effects, life insurance, and bank deposits may be excluded, and no monetary valuations need be included.

C. Personal Liabilities: Please report the personal liabilities of fifty thousand dollars (\$50,000) or more, excluding loans secured by the homestead and by life insurance.

Financial Disclosure Form

- D. Please report your positions and those of your spouse, your parents, and your children as officers, directors, partners or employees of any non-profit or profit making corporation, partnership, labor union, or association, together with an indication with respect to each relationship whether the service is gratuitous or compensated.

Attestation

Type or Print Name:

I confirm that I have read and understand the University of Maine System Board of Trustees Policy Manual Sec. 206 and 17 MRSA Sec. 3104, and agree to abide by them. I have provided appropriate responses to each of the questions on this form and, if applicable, I have provided the required additional information.

Signature _____

Date _____

Financial Disclosure Form**Appendix A**

University of Maine System Board of Trustees Policy Manual

Section 206 Board of Trustees – Ethics Code and Conflict of Interest

Effective: 4/24/74

Last Revised: 11/6/95; 7/13/09; 11/20/17, 4/8/24

Responsible Office: Clerk of the Board

Policy Statement:

A Trustee has a conflict of interest when an action by the University of Maine System, whether isolated, recurring or continuous, is to the financial or other advantage of the Trustee, the Trustee's employer or client, the Trustee's spouse, parent, or child.

A Trustee who is an attorney or a firm or partnership of which the Trustee is a part may not represent or provide legal advice or services to the University of Maine System or knowingly represent clients in litigation or other contested matters which involves the assertion of any claim against the University of Maine System or which is adverse to its interests or are otherwise prohibited by the Maine Rules of Professional Conduct.

Except to fill a temporary vacancy in a position on an interim basis, a Trustee may not seek or hold a position in the University of Maine System prior to one year following the end of their service as a member of the Board. This prohibition does not apply to the Student Trustee or the Commissioner of Education serving in an ex officio capacity, provided however that those Trustees remain otherwise subject to the Board's conflict of interest policies and requirements during their service as Board members.

In order to implement the requirements of Private and Special Law 2023, chapter 14, Student Members of the Board may be accorded a liberal interpretation of applicable conflict of interest statutes and policies so as to ensure their participation in the conduct of the Board's business to the greatest extent possible in recognition that their primary role is as students, regardless of status as student employees.

Procedures:

1. Each Trustee is responsible for identifying and notifying the Chair of a conflict of interest. A Trustee may consult with the System's General Counsel to determine whether a conflict exists in any situation. When a conflict exists, the Trustee shall declare such conflict at the earliest opportunity and either eliminate the conflict or refrain from debate and discussion at Board Committee meetings or Board meetings unless invited to participate by a majority vote of the Board Committee or by the Board. Further, the Trustee shall register an abstention when a vote is taken on the matter by the Board or Board Committee.
2. Each Trustee, upon appointment to the Board, and, as a minimum, for each Annual Meeting thereafter, shall file a Financial Disclosure Form (copy of which may be obtained from the Clerk's Office) with the Clerk of the Board. Such a form shall include, when completed, a listing of all:

Financial Disclosure Form

3.1

- a. continuous conflicts of interest known to the Trustee.
 - b. real and personal property owned by the Trustee, the Trustee's spouse, or minor child with a value of one hundred thousand dollars (\$100,000) or more. The homestead, household furnishings, personal effects, life insurance, and bank deposits may be excluded, and no monetary valuations need be included.
 - c. personal liabilities of fifty thousand dollars (\$50,000) or more, excluding loans secured by the homestead and by life insurance.
 - d. positions of Trustees and spouses as officers, directors, partners or employees of any non-profit or profit-making corporation, partnership, labor union, or association, together with an indication with respect to each relationship whether the service is gratuitous or compensated.
3. The Financial Disclosure Form shall be available for public inspection in the Office of the Clerk of the Board.
 4. Alleged violations of this policy, from whatever source presented, shall be received by the Clerk of the Board. The Chair, or the Vice Chair if the Chair is involved, shall appoint a three-person ad hoc committee to investigate the allegations and report its findings and recommendations to the Board of its determination.

Related Documents:
Board of Trustees Financial Code of Ethics Disclosure Form

Title 17 MRSA Section 3104

Financial Disclosure Form

Appendix B

17 MRSA Sec. 3104

§3104. Conflicts of interest; purchases by the State

No trustee, superintendent, treasurer or other person holding a place of trust in any state office or public institution of the State shall be pecuniarily interested directly or indirectly in any contracts made in behalf of the State or of the institution in which he holds such place of trust, and any contract made in violation hereof is void. This section shall not apply to purchases of the State by the Governor under authority of Title 1, section 814.

University of Maine System
Board of Trustees

4

AGENDA ITEM SUMMARY

NAME OF ITEM: Honorary Degree Nominations for 2025

INITIATED BY: Dannel P. Malloy, Chancellor

BOARD INFORMATION:

BOARD ACTION: X

BOARD POLICY:

213 - Honorary Degrees

UNIFIED ACCREDITATION CONNECTION:

N/A

BACKGROUND:

Honorary Degree nominations from the University of Maine System campuses are presented annually for approval. In accordance with Board practice, the nominations are presented a year in advance and will be reviewed in Executive Session. Action will be taken in the public meeting without identification of the individual honorees. Publicity is the responsibility of the campus after arrangements for conferral of the degree are complete.

TEXT OF PROPOSED RESOLUTION:

That the Board of Trustees approves the 2025 nominations for Honorary Degrees as presented.

Attachment:

Honorary Degree Nominations for 2025 - List (*Confidential*)

Honorary Degree Nominations for 2025 - Narratives (*Confidential*)

University of Maine System
Board of Trustees

AGENDA ITEM SUMMARY

5

NAME OF ITEM: FY2025 Updated Proposed University of Maine System Operating Budget and Student Charges – Committee Vote, UMS

CAMPUS PRESENTER(S): Ryan Low, Vice Chancellor for Finance and Administration

INITIATED BY: Dannel P. Malloy, Chancellor

BOARD INFORMATION:

BOARD ACTION: X

BOARD POLICY:

Policy 701 – [Operating & Capital Budgets](#)

UNIFIED ACCREDITATION CONNECTION:

N/A

BACKGROUND:

Vice Chancellor for Finance and Administration & Treasurer Ryan Low will present the FY2025 Updated Proposed University of Maine System Operating & Capital Budget and Student Charges.

This is the updated, second reading of the budget, and a vote of the Committee will be taken for this item to be forwarded to the May 21-22, 2023 Board of Trustees meeting.

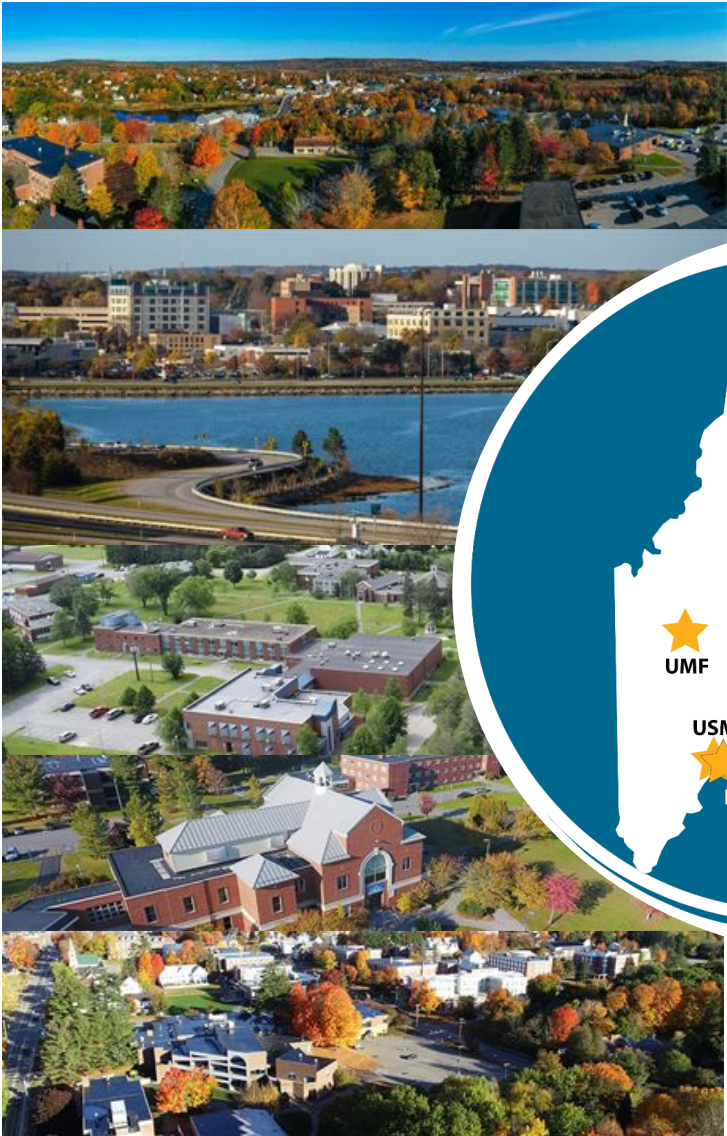
The Finance, Facilities and Technology committee approved this item to be forwarded to the May 19th/20th, 2024 Board of Trustees meeting, for approval of the following resolution:

TEXT OF PROPOSED RESOLUTION:

That the Board of Trustees accepts the recommendation of the Finance, Facilities and Technology Committee, and approves the FY2025 Updated Proposed University of Maine System Operating & Capital Budget, Recommended Student Charges, and proposed transfers from Institutional Reserves.

Attachment

[FFT FY25 Materials](#)

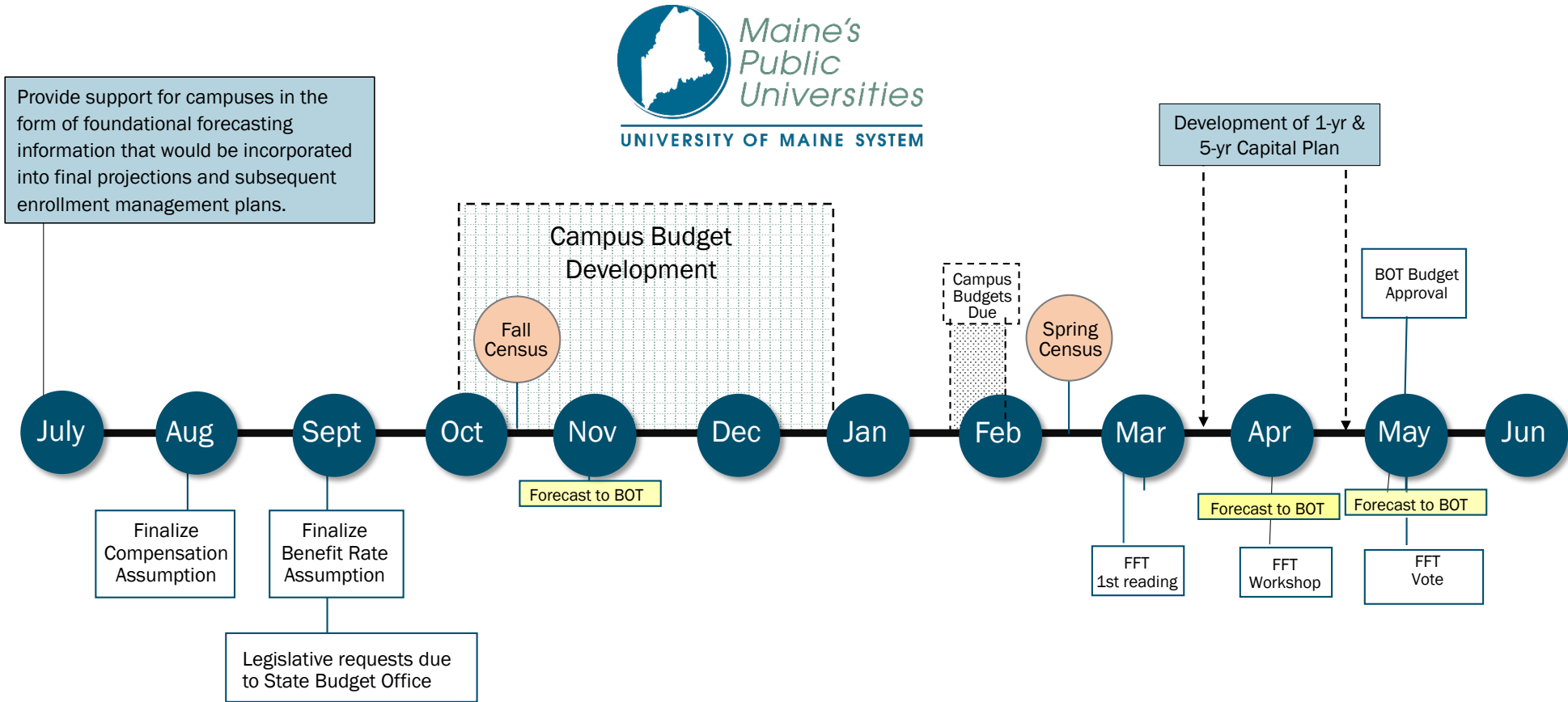


FY25
Operating Budget

Board of Trustees
May 20, 2024

Unified Budget Timeline

5.1

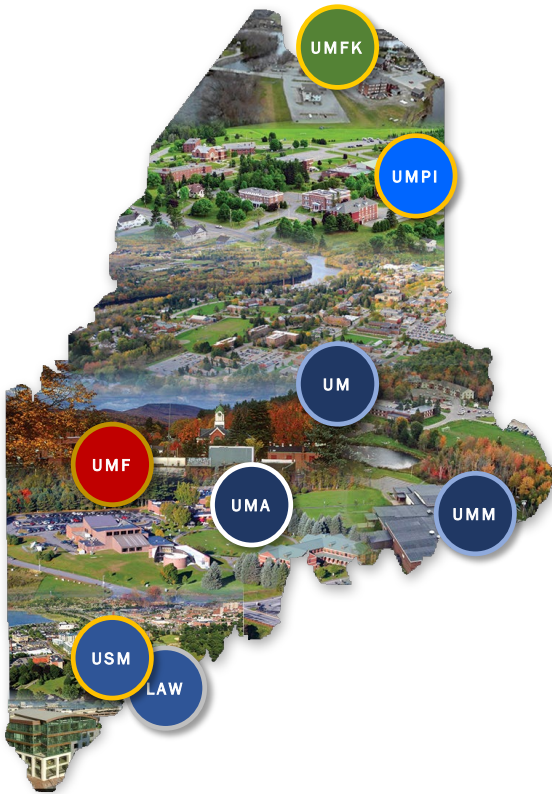


BOT – Board of Trustees
FFT – Finance, Facilities & Technology



FY25 Budget Pressures

5.1



- Lack of growth in credit hour generation
- Number of on-campus residents continues to impact auxiliary revenues for dining and residence halls – especially at the smaller campuses.
- Labor shortages and financial pressures to attract and retain employees.



FY25 Budget Assumptions

5.1



Systemwide Budget Assumptions

(used by all campuses)

- In-State, undergraduate tuition rate
- Appropriation
- Compensation & Benefits
- CPI
- Capital Expenditures

Campus-specific budget assumptions

- Enrollment
- Out-of-State tuition rate
- Financial Aid



FY25 Budget Overview

- **Enrollment**

Enrollment budgeting process focuses on realistic trends in a post-COVID 19 environment with increased remote learning.

FY25 budgeted credit hours are basically flat – slightly above FY24 budgeted hours and slightly below FY24 actual hours.

- **Occupancy** - Low student housing occupancy continues to be an issue at some of the smaller campuses.

- **Appropriation** - Governor's FY24-FY25 biennial budget includes a \$9.97 million (4.3%) base increase.

- **Capital** - Unrestricted investments are increasing by \$1.4 million or 4.3% over the FY24 budget

- **Budget Balancing**

- *For the first time since FY14, campuses budgets are balanced without the utilization of Budget Stabilization Funds*

- Utilization of Reserves - UM \$4.7 (net)

- UMA & UMPI are budgeting positive operating results





FY25 Budget Overview

5.1

	E&G	Auxiliary	Total	Campus Reserves	Proposed Budget Stabilization	Total
UMaine	\$ (4,810,455)	\$ 93,661	\$ (4,716,794)	\$ 4,810,455	\$ 0	\$ 93,661
UMA	1,520,876	(392,590)	1,128,286	-	-	1,128,286
UMF	(341,142)	341,142	-	-	-	0
UMFK	835,798	(835,798)	-	-	-	0
UMPI	2,144,663	(445,482)	1,699,181	-	-	1,699,181
USM	(356,494)	356,494	-	-	-	0
Maine Law	-	-	-	-	-	0
Governance/Univ. Serv.	(500,505)		(500,505)	500,505*	-	0
Total	\$(1,507,260)	\$ (882,572)	\$ (2,389,832)	\$ 5,310,960	\$0	\$ 2,921,128

*Early College & Interpersonal Violence Prevention – State Restricted Appropriation carryforward



Budget Stabilization Fund

The Budget Stabilization Fund was created to enable the UMS to smooth the financial impact of adverse markets, economic conditions, and address other financial challenges.

The Fund was established in 2010 and has been built from net investment income that exceeded budget & strategic needs pursuant to the Board of Trustees investment policy.

The Treasurer will authorize only the transfer needed to offset a net unrestricted operating loss for each institution at the close of FY24.

Balance 6/30/23		\$4,996,700
Utilization	FY24 (approved)	
UMFK	(500,000)	
Projected Balance 6/30/24		\$4,496,700



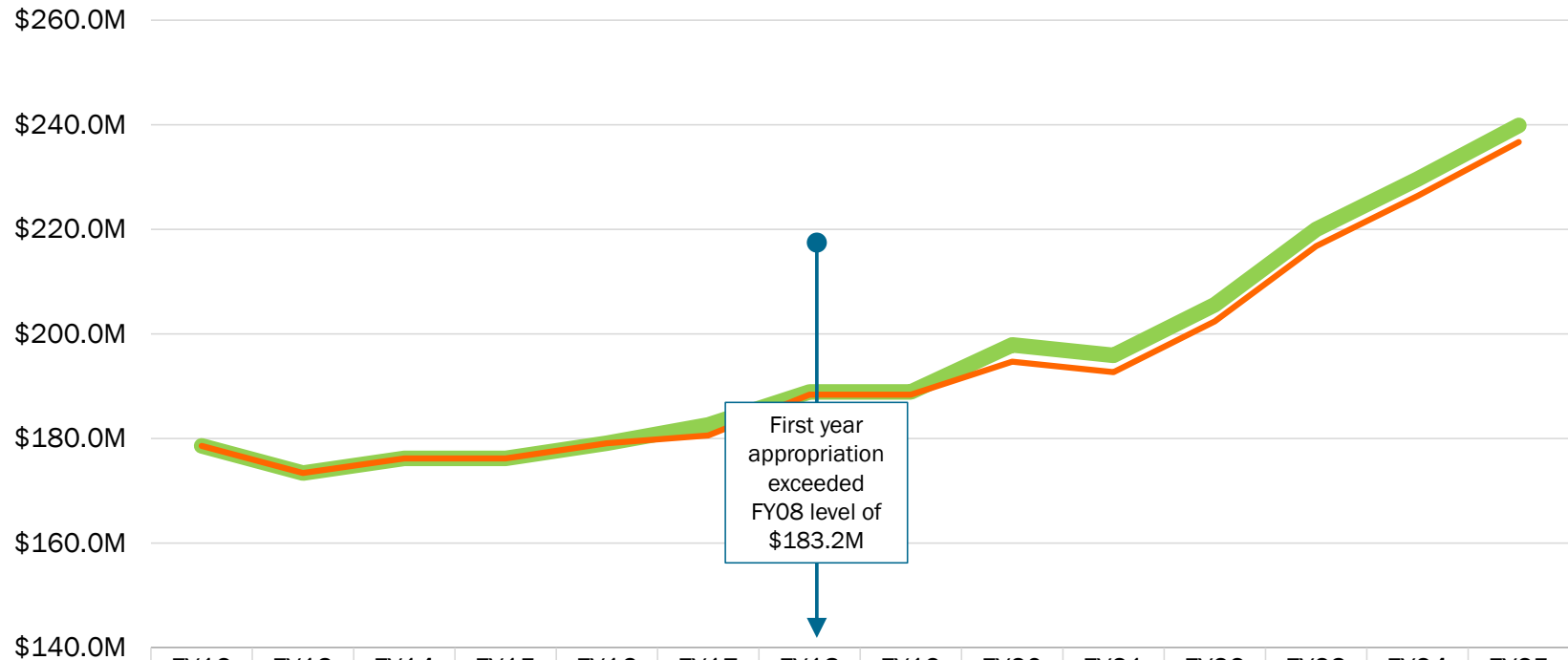


E&G State Appropriation

(Excludes restricted funds - , i.e. MEIF & Debt Service)

8

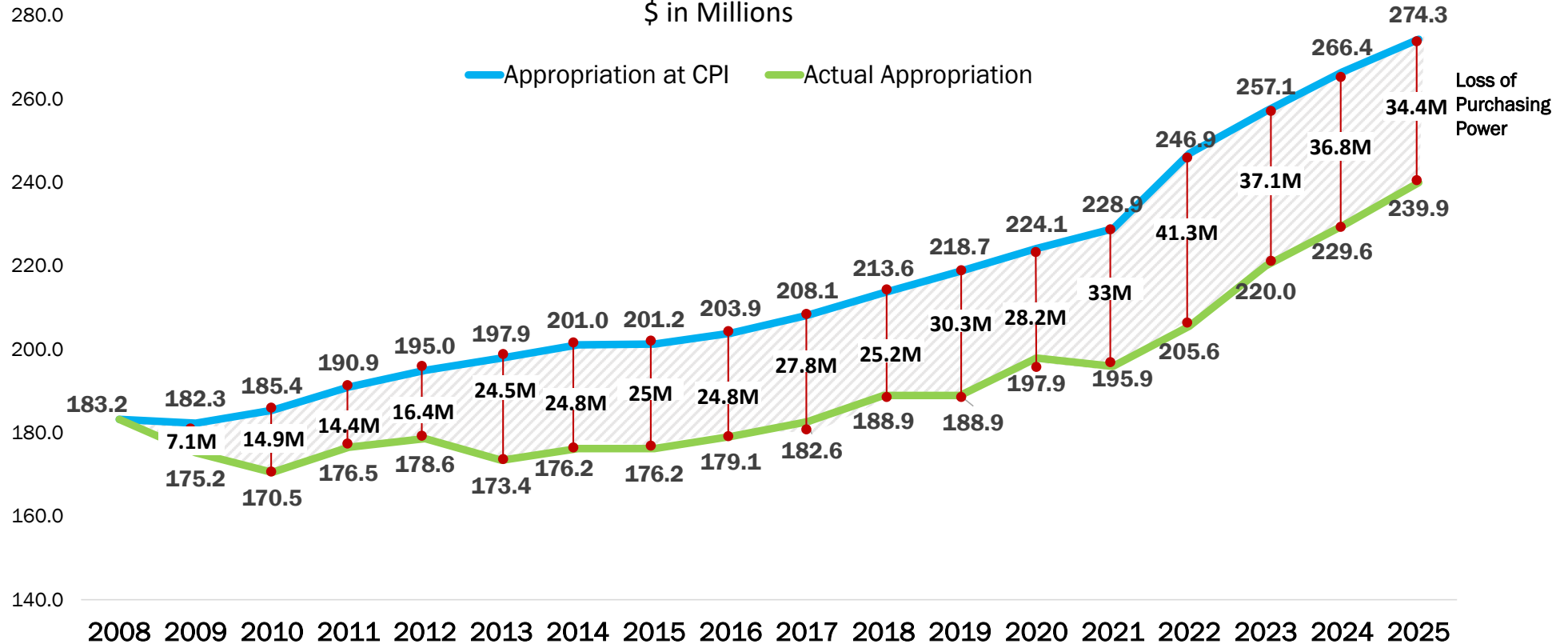
5.1



	FY12	FY13	FY14	FY15	FY16	FY17	FY18	FY19	FY20	FY21	FY22	FY23	FY24	FY25
Total	178.6	173.4	176.2	176.2	179.1	182.6	188.9	188.9	197.9	195.9	205.6	220.0	229.6	239.9
General Appropriation	178.6	173.4	176.2	176.2	179.1	180.6	188.4	188.4	194.7	192.7	202.4	216.8	226.4	236.7
Early College						2.0	0.5	0.5	1.7	1.7	1.7	1.7	1.7	1.7
Adult Degree Completion									1.5	1.5	1.5	1.5	1.5	1.5

2008 Appropriation at CPI vs Actual through 2025

\$ in Millions

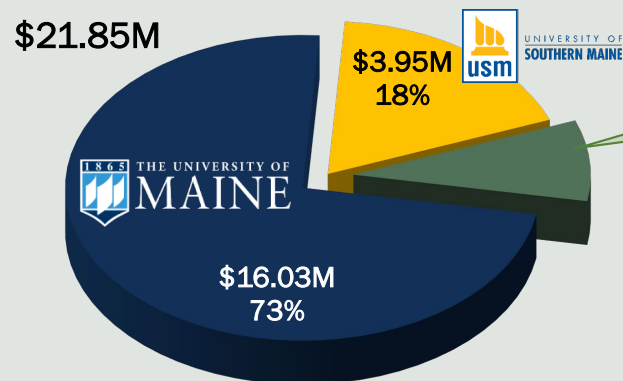




Maine Economic Improvement Fund (MEIF)

5.1

	UMaine	USM	System	Total
Biotechnology	\$1,823,974	\$91,552		\$ 1,915,526
Aquaculture & Marine	2,715,955	819,656		3,535,611
Composite Materials	1,451,591	230,000		1,681,591
Environmental	1,242,424	230,000		1,472,424
Forestry & Agriculture	2,186,393	251,667		2,438,060
Information Technology	1,658,956	831,174		2,490,130
Precision Manufacturing	1,531,198	230,000		1,761,198
Cross Sector	3,425,109	1,262,351		4,687,460
Small Campus Initiative			\$ 655,500	655,500
Small Campus Project Support			1,212,500	1,212,500
Total	\$16,035,600	\$3,946,400	\$1,868,000	\$21,850,000



SYSTEM

Grand Challenge Projects \$1,212,500 (6%)

Small Campus Initiative (SCI) \$655,500 (3%)

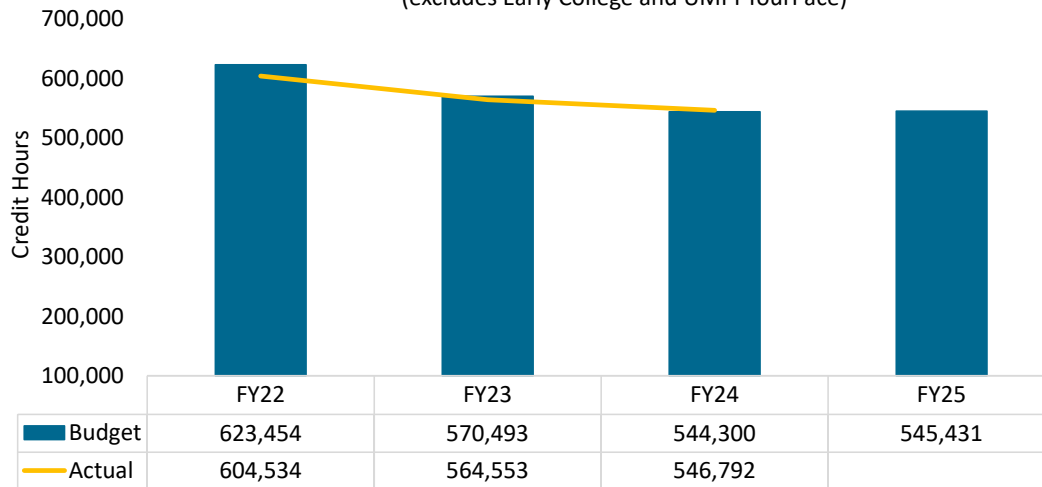
A competitive award program for UMA, UMF, UMFK, UMPI, and the Maine Maritime Academy.



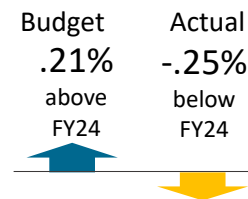
UMS Enrollment

UMS Total Credit Hour Enrollment

(excludes Early College and UMPI YourPace)



FY25 Enrollment Budget

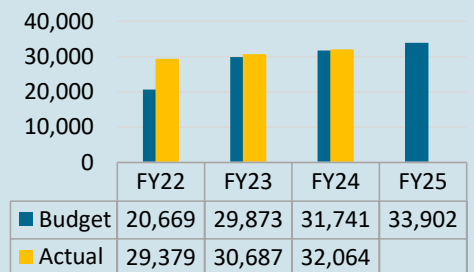


Major factors impacting enrollment:

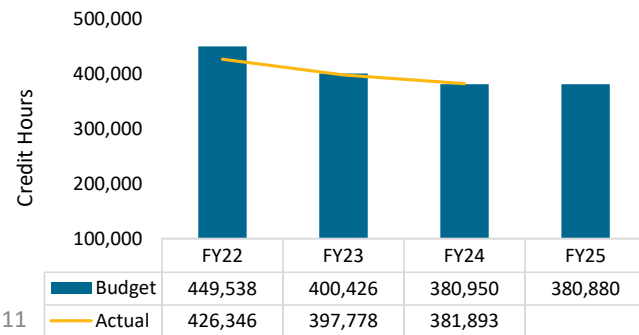
-FY25 Credit hours are basically flat to both the FY24 budget & actuals

-Credit hours for all years have been adjusted to exclude UMPI's YourPace enrollments. These courses are based on a flat fee per session rather than credit hours

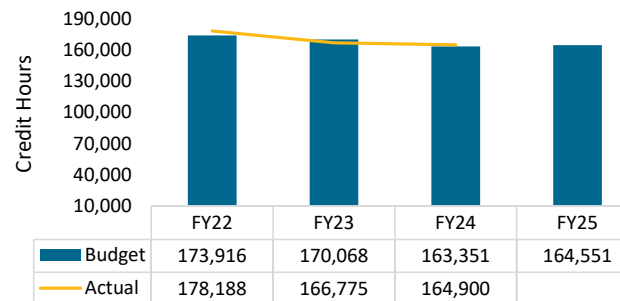
Early College



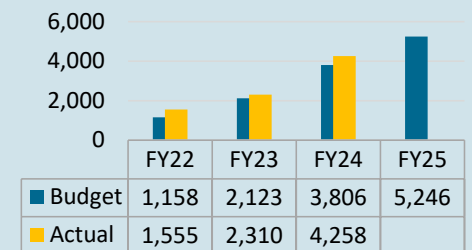
In-State (excludes EC)



Out-of-State



UMPI YourPace Subscriptions



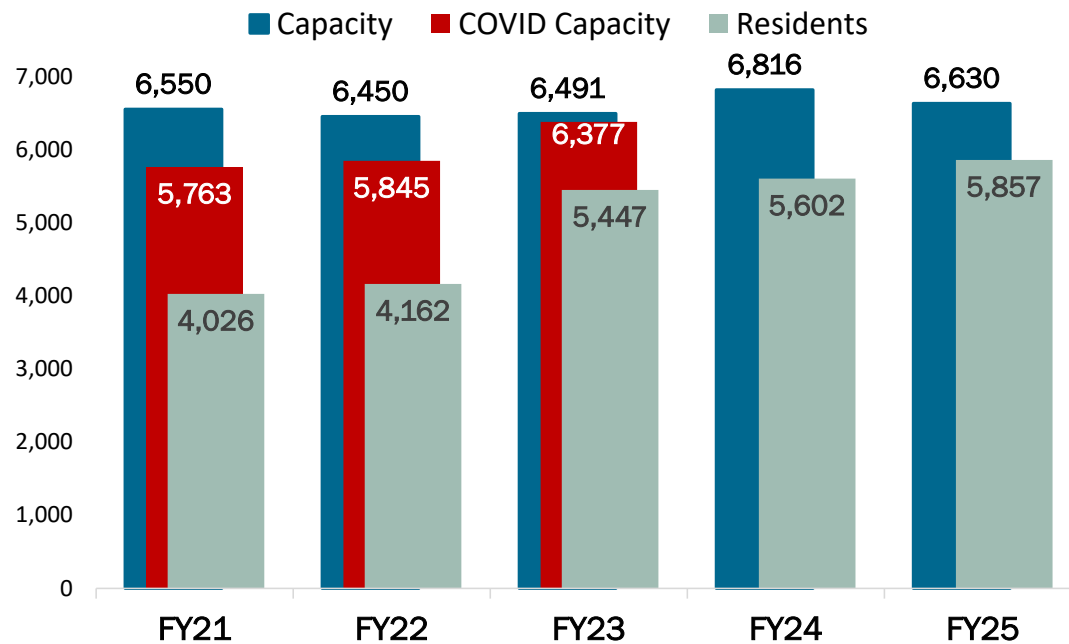
Actuals are at end of term vs. at census due to the timing of session II enrollment

5.1



Residence Hall Occupancy (Annual Average)

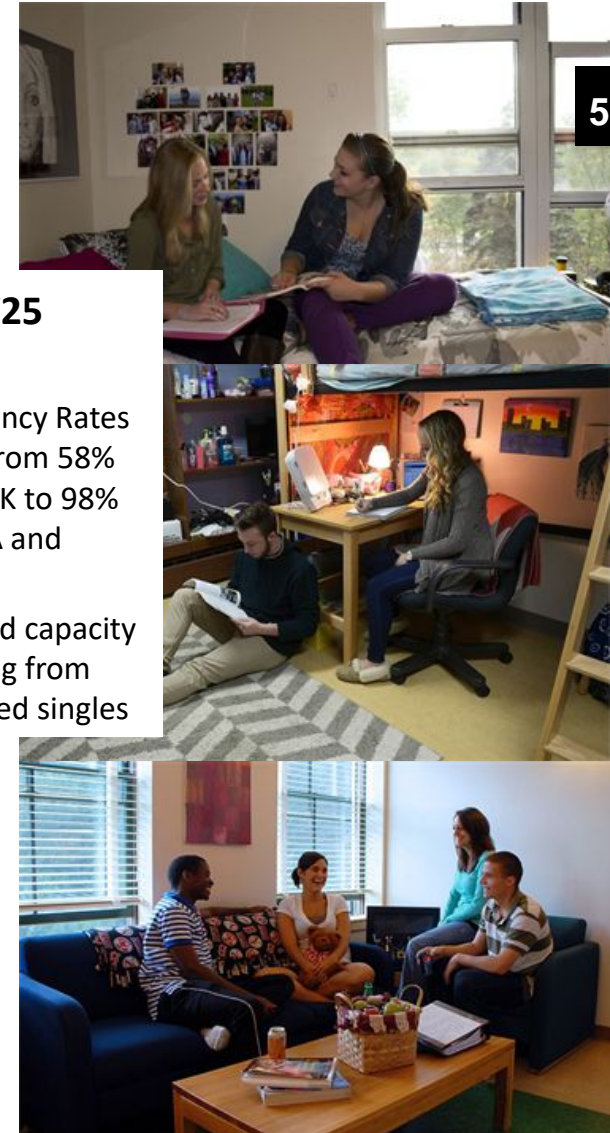
UMS Total



Normal Occupancy	61%	65%	84%	82%	88%
COVID Occupancy	70%	71%	85%		

FY25

- Normal Occupancy Rates range from 58% at UMFK to 98% at UMA and UMF.
- Reduced capacity resulting from increased singles

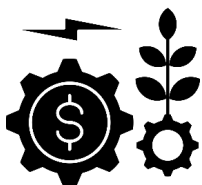


5.1



Efficiencies

Energy



- HVACs
- LED Lighting
- Window Replacements
- Charging Stations
- Energy Audits
- Diversification of fuel sources including propane
- Solar Panels
- Biomass Boilers for energy savings

Space



- Shared spaces with other campuses and community colleges
- Space reduction thru demolition
- Space reduction thru sale
- Remove oil tanks
- Lease excess space to 3rd parties

- Reduction of low-enrolled & duplicative courses
- Streamlining academic departments
- Building alliances with other UMS campuses to share programs and teaching faculty
- Shared administrative services between campuses such as Financial Aid Offices
- Shared administrative services across departments/divisions
- Tightening policies on spending for travel and meeting costs
- Workforce management;-Realign positions from retirements & resignations; Strategic use of adjuncts & overloads
- Increasing summer programming & activities to fully utilize campus/facilities
- Expending micro-credentials, certificates, & badges
- Partnerships Statewide with employers to offer employee development courses per their HR educational benefits
- Maximize use of philanthropic-funded scholarships and award strategies
- Increased connections with MCCS graduates for continuing enrollment
- Examine & review membership to reduce duplicative or non-mission critical
- Growth in research productivity driving indirect cost return

5.1



FY25 Recommended Tuition Credit Hour Rates

5.1

Undergraduate

In-State	FY24	FY25	Increase	
UMaine	\$400	\$412	\$12	3.0%
UMM	\$290	\$299	\$9	3.1%
UMA/UMFK/UMPI	\$252	\$260	\$8	3.2%
UMF/USM	\$297	\$306	\$9	3.0%

Out-of-State	FY24	FY25	Increase	
UMaine	\$1,158	\$1,193	\$35	3.0%
UMM	\$565	\$582	\$17	3.0%
UMA	\$683	\$703	\$20	2.9%
UMF	\$700	\$725	\$25	3.6%
UMFK/UMPI	\$428	\$442	\$14	3.3%
USM	\$875	\$901	\$26	3.0%

Graduate

In-State	FY24	FY25	Increase	
UMaine	\$557	\$557	\$0	0.0%
UMA	\$445	\$458	\$13	2.9%
UMF	\$440	\$453	\$13	3.0%
USM	\$445	\$459	\$14	3.1%
Law-3L	\$773	\$773	\$0	0.0%
Law-2L	\$796	\$796	\$0	0.0%
Law-New		\$820	\$24	3.0%

Out-of-State	FY24	FY25	Increase	
UMaine	\$1,696	\$1,696	\$0	0.0%
UMA	\$587	\$605	\$18	3.1%
UMF	\$440	\$453	\$13	3.0%
USM	\$1,350	\$1,390	\$40	3.0%
Maine Law	\$1,200	\$1,200	\$0	0.0%



Special/Differential Tuition Rates

5.1

Campus	Program/Modality		FY24	FY25	Unit	Increase	
						\$	%
UMaine	MBS Business School	Graduate program	679	750	CH	71	10.5
	Res'd Online		400	400	CH	-	-
	NR Online (e-rate)		500	500	CH	-	-
	Graduate (Grad Asst)		*	557	CH		
	Graduate On line	MBA	679	750	CH	71	10.5
		Engineering	732	732	CH	-	-
		Education	567	567	CH	-	-
		All Other	608	608	CH	-	-
	Grad Differential Tuition	Engineering	335	335	Semester	-	-
		Nursing	397	397	Semester	-	-
UMA	Dental Health (DEH)	Elim Course fee	853	1,060	CH	207	24.3
	Dental Assisting (DEA)	Elim Course fee	353	410	CH	57	16.1
	Expanded Function Dental	Elim Course fee	252	410	CH	158	62.7
	Computer Info Systems (CIS)	Elim Course fee	252	285	CH	33	13.1
	Data Science (DSC)	Elim Course fee	252	285	CH	33	13.1
	Cybersecurity (CYB)	Elim Course fee	252	315	CH	63	25.0
	Information Systems (ISS)	Elim Course fee	252	315	CH	63	25.0
	Architecture (ARC)	Elim Course fee	439	470	CH	31	7.1
	Non Res'd UG On Line		329	390	CH	61	18.5

* Prior to FY25, Grad Assistant rates were based on residency; beginning in FY25, all Grad Assistants pay a single rate.



Special/Differential Tuition Rates

5.1

Campus	Program/Modality		FY24	FY25	Unit	Increase	
						\$	%
UMFK	Undergrad-Flat Rate	RN_BSN	309	318	CH-no fees	9	2.9
	Graduate Online-Flat Rate	MSN and DNP	500	500	CH-no fees	-	-
UMPI	YourPace	UG	1,500	1,700	Session	200	13.3
		GRAD	2,150	2,350	Session	200	9.3
USM	NR UG On Line		486	343	CH	(143)	(29.4)
	NR GR e-rate		729	509	CH	(220)	(30.2)
	BS Nursing	In-State	306	0	CH	(306)	(100.0)
		Out-of-State	901	0	CH	(901)	(100.0)
	Accelerated Nursing	In-State	306	0	CH	(306)	(100.0)
		Out-of-State	901	0	CH	(901)	(100.0)
	Differential 2	UG In-State/Canadian		325	CH	325	
		UG NEHBE		569	CH	569	
		UG Out of State		956	CH	956	
		G In-State/Canadian		486	CH	486	
		G NEHBE		851	CH	851	
		G Out of State		1,474	CH	1,474	
	Differential 3	UG In-State/Canadian		343	CH	343	
		UG NEHBE		600	CH	600	
		UG Out of State		1,010	CH	1,010	
		G In-State/Canadian		515	CH	515	
		G NEHBE		901	CH	901	
		G Out of State		1,557	CH	1,557	



Annual Mandatory Fees

				Increase
<u>Undergraduate</u>		FY24	FY25	\$
UM	Student Activity	\$156	\$156	
	Infrastructure & Technology Fee	450	810	
Total		\$606	\$966	360
UMM	Student Activity	\$270	\$270	
	Infrastructure & Technology Fee	450	810	
Total		\$720	\$1,080	360
UMA	Student Activity	\$68	\$68	
	Unified Fee	990	1,020	
Total		\$1,058	\$1,088	30
UMF	Academic Support Fee	\$740	\$762	
	Student Activity	160	160	
	Student Support Fee	879	906	
	Technology Fee	300	300	
Total		\$2,079	\$2,128	49
UMFK	Student Activity	\$225	\$225	
	Technology Fee	300	360	
	Unified Fee	960	1,020	
Total		\$1,485	\$1,605	120
UMPI	Student Activity	\$170	\$176	
	Technology Fee	300	360	
	Unified Fee - Campus	960	1,020	
Total		\$1,430	\$1,556	126
USM	Comprehensive Fee	\$2,400	\$2,490	
	Student Activity	150	150	
	Technology Fee	240	270	
Total		\$2,790	\$2,910	120
Average		\$1,453	\$1,619	166

				Increase
<u>Graduate</u>		FY24	FY25	\$
UM	Infrastructure & Technology Fee	\$270	\$486	
	Student Activity	150	150	
Total		\$420	\$636	216
UMA	Student Activity	\$41	\$41	
	Unified Fee	594	612	
Total		\$635	\$653	18
UMF	Technology Fee	\$180	\$180	
	Academic Support Fee	377	388	
Total		\$557	\$568	11
USM	Comprehensive Fee	\$1,440	\$1,494	
	Technology Fee	144	162	
Total		\$1,584	\$1,656	72
Average		\$799	\$878	79
<u>Law</u>				
	Comprehensive Fee	\$1,350	\$1,800	
	Student Activity	150	150	
	Technology Fee	210	210	
Average		\$1,710	\$2,160	450

5.1



FY25 Recommended Room & Board Rates

5.1

Room & Board rates shown are based on the room types & meal plans with the greatest projected number of students.



UMaine	FY24	FY25	Increase	%
Room	\$6,320	\$6,670	\$350	
Board	\$6,076	\$6,490	\$414	
Total	\$12,396	\$13,160	\$764	6.2%

UMA	FY24	FY25	Increase	%
Room	\$7,914	\$8,152	\$238	3.0%
Board	N/A	\$651		
Total	\$7,914	\$8,803	\$238	3.0%

UMF	FY24	FY25	Increase	%
Room	\$6,950	\$7,090	\$140	
Board	\$5,360	\$5,588	\$228	
Total	\$12,310	\$12,678	\$368	3.0%

UMFK	FY24	FY25	Increase	%
Room	\$5,140	\$5,140	\$0	
Board	\$4,450	\$4,450	\$0	
Total	\$9,590	\$9,590	\$0	0.0%

UMM	FY24	FY25	Increase	%
Room	\$4,890	\$4,890	\$0	
Board	\$5,960	\$6,258	\$298	
Total	\$10,850	\$11,148	\$298	2.7%

UMPI	FY24	FY25	Increase	%
Room	\$5,300	\$5,460	\$160	
Board	\$5,000	\$5,250	\$250	
Total	\$10,300	\$10,710	\$410	4.0%

USM	FY24	FY25	Increase	%
Room	\$6,130	\$6,380	\$250	
Board	\$5,520	\$5,741	\$221	
Total	\$11,650	\$12,121	\$471	4.0%



Annual Comprehensive Student Charges

(Includes Tuition, Mandatory Fees, Room & Board)

5.1

UNDERGRADUATE

In-State & Canadian	FY24	FY25	Increase	
			\$	%
UM	\$25,002	\$26,486	1,484	5.9
UMM	20,270	21,198	928	4.6
UMA	16,532	17,691	1,159	7.0
UMF	23,299	23,986	687	2.9
UMFK	18,635	18,995	360	1.9
UMPI	19,290	20,066	776	4.0
USM	23,350	24,211	861	3.7
Average	21,379	22,200	821	3.8

Out-of-State

UM	\$47,742	\$49,916	2,174	4.6
UMM	28,520	29,688	1,168	4.1
UMA	29,462	30,981	1,519	5.2
UMF	35,389	36,556	1,167	3.3
UMFK	23,915	24,455	540	2.3
UMPI	24,570	25,526	956	3.9
USM	40,690	42,061	1,371	3.4
Average	33,366	34,564	1,198	3.6

NEBHE

UM	\$34,002	\$35,756	1,754	5.2
UMM	26,810	27,918	1,108	4.1
UMA	21,812	23,151	1,339	6.1
UMF	29,509	30,886	1,377	4.7
UMFK	23,915	24,455	540	2.3
UMPI	24,570	25,526	956	3.9
USM	29,590	31,111	1,521	5.1
Average	27,640	28,796	1,156	4.2

GRADUATE

In-State & Canadian	FY24	FY25	Increase	
			\$	%
UM	\$22,842	\$23,822	980	4.3
UMA	16,559	17,700	1,141	6.9
UMF	20,787	21,400	613	2.9
USM	21,244	22,039	795	3.7
Average	21,410	22,203	793	3.7

Out-of-State

UM	\$43,344	\$44,324	980	2.3
UMA	19,115	20,346	1,231	6.4
UMF	20,787	21,400	613	2.9
USM	37,534	38,797	1,263	3.4
Average	31,247	32,179	932	3.0

NEBHE

UM	\$30,366	\$31,346	980	3.2
UMA	22,175	23,478	1,303	5.9
USM	26,860	27,817	957	3.6
Average	27,837	28,827	990	3.6

LAW

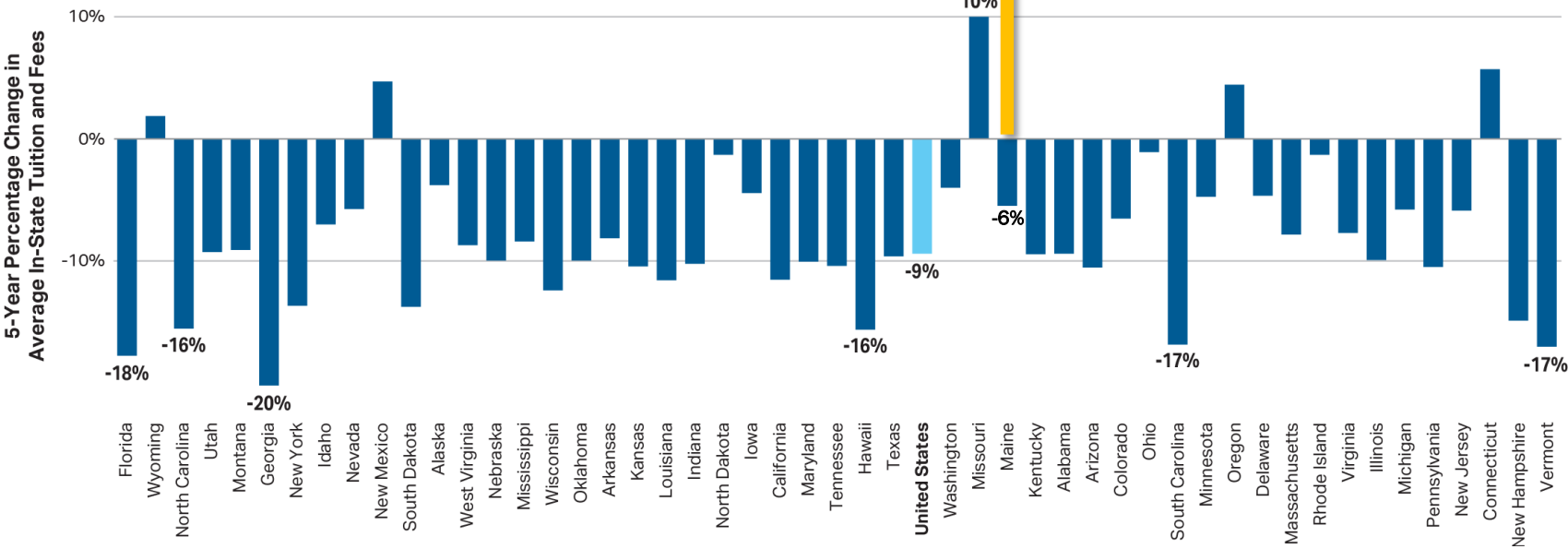
In-State/Canadian - Y3	\$36,550	\$37,471	921	2.5
- Y2	\$37,240	\$38,161	921	2.5
-New		\$38,881	1,641	4.4
Out-of-State	\$49,360	\$50,281	921	1.9
NEBHE	\$45,010	\$45,931	921	2.0

2023-24 Average Annual Tuition Growth Rates

Tuition and Fees by State — Public Four-Year In-State

Adjusted for inflation

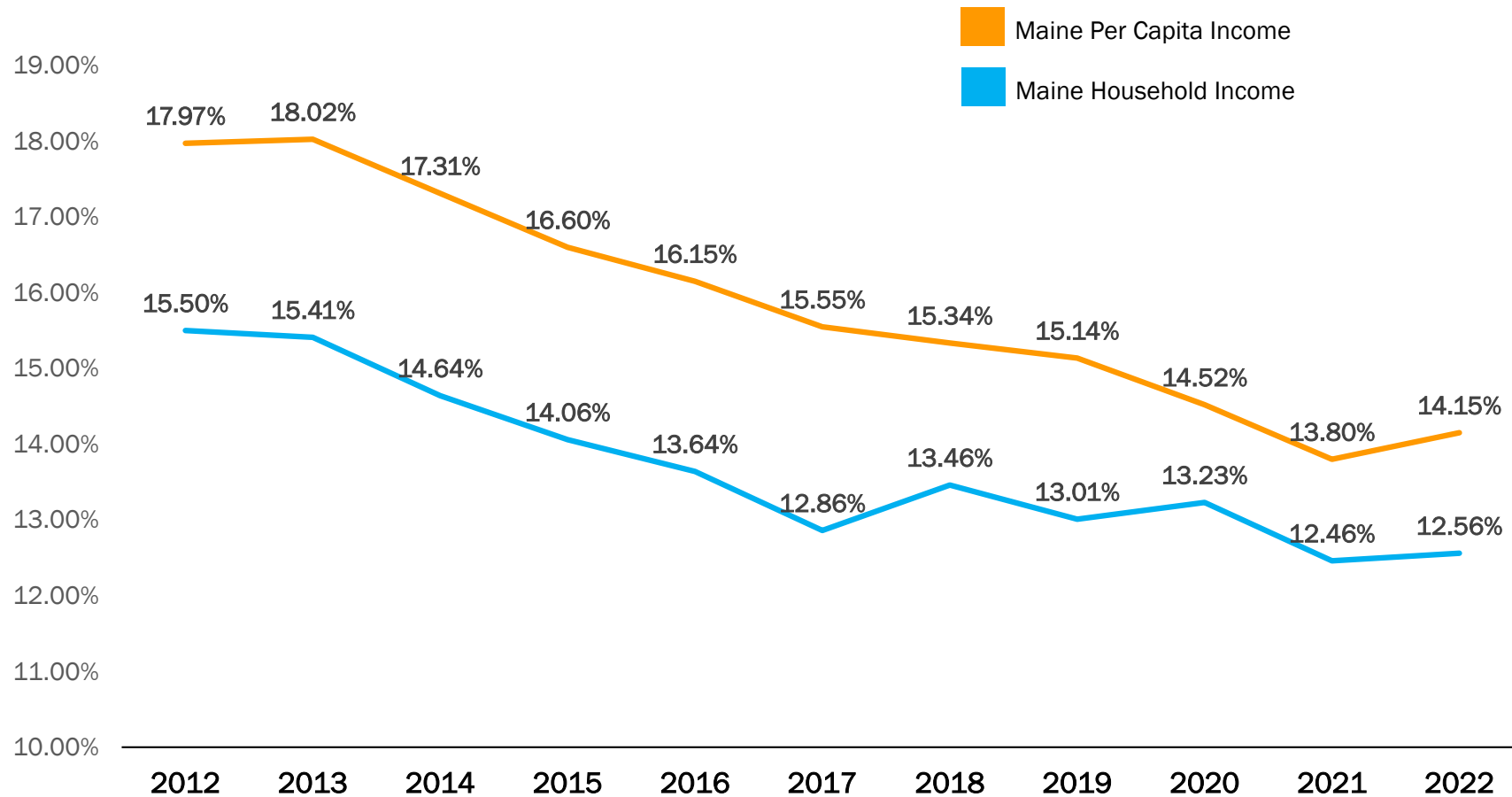
Source: College Board, Trends in Pricing and Student Aid 2023





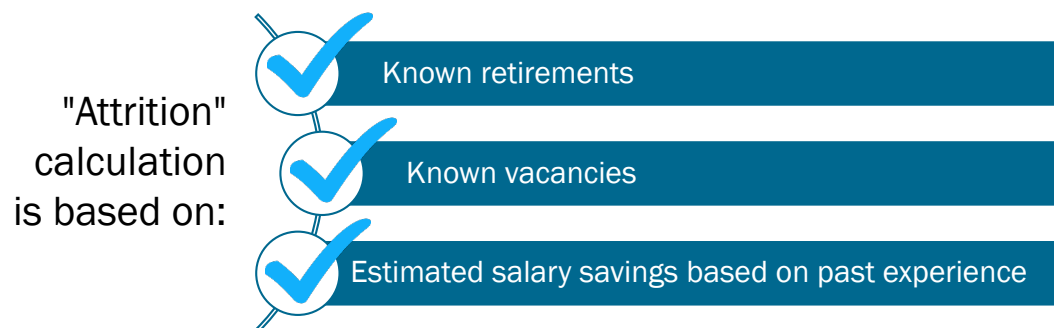
UMS In-State Tuition as a Percentage

5.1



FY25 Budgeted Attrition

All active positions are budgeted at 100% in "Salaries, Wages & Benefits"

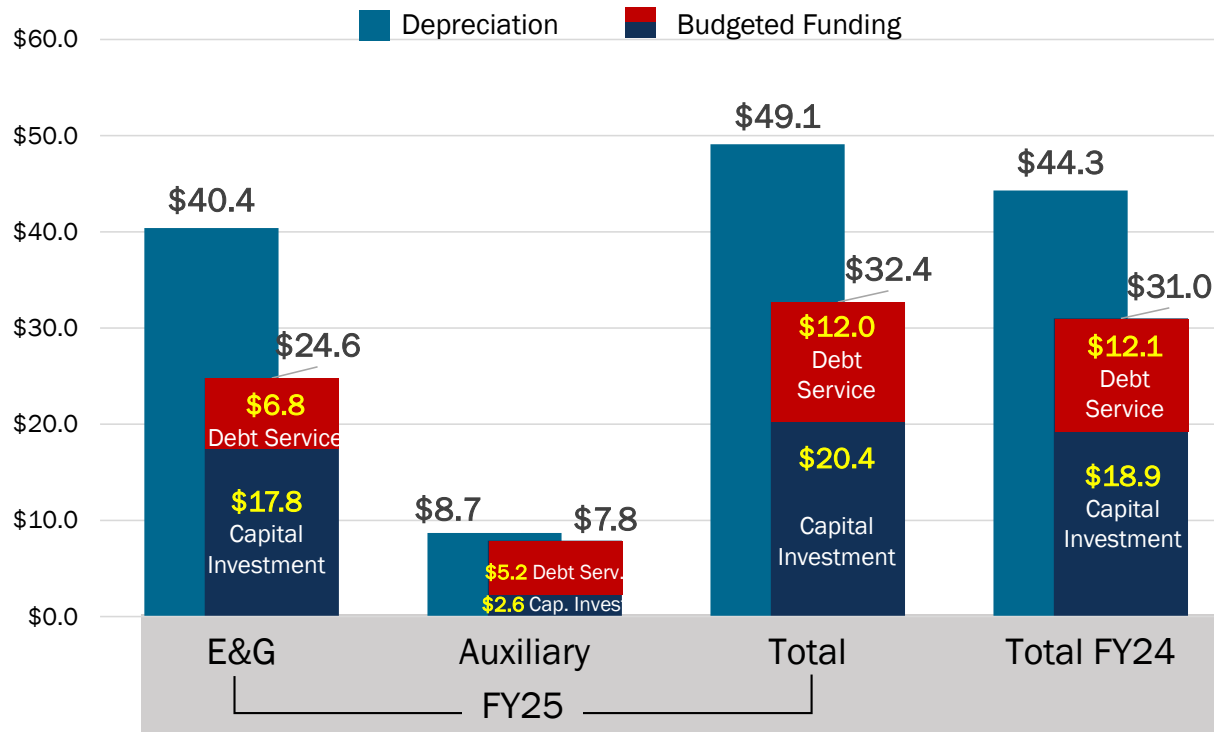


	(\$ in Millions)	
	Salary & Wages Only	Salary & Wages incl. Benefits
UMaine	\$1.15	\$1.65
UMA	1.44	2.07
UMF	0.90	1.29
UMFK	0.31	0.45
UMPI	-	-
USM	2.58	3.70
LAW	0.10	0.15
GUS	0.70	1.00
TOTAL	\$7.18	\$10.31

5.1

Funding Depreciation

Funding Depreciation by Fund
(\$ in millions)

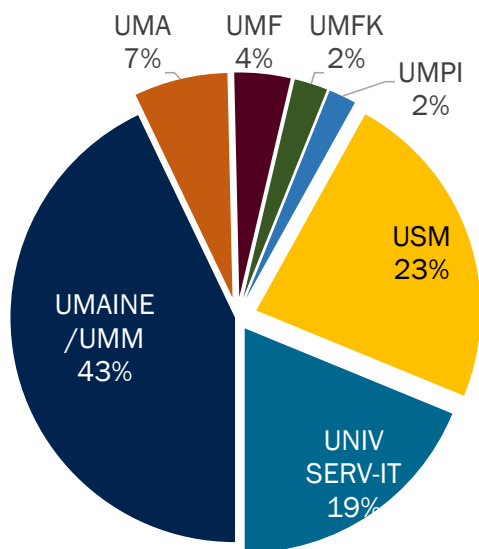


- Total investment increase is \$1.4M or 4.3%
- Depreciation expense increased by \$4.8M
- E&G and Auxiliary budgeted capital investment = \$20.4M – an increase of \$1.5M
- 66% of the total depreciation expense is funded in the FY25 budget – down 4% from the FY24 budget.

5.1

Capital Investments

TOTAL % INVESTMENT

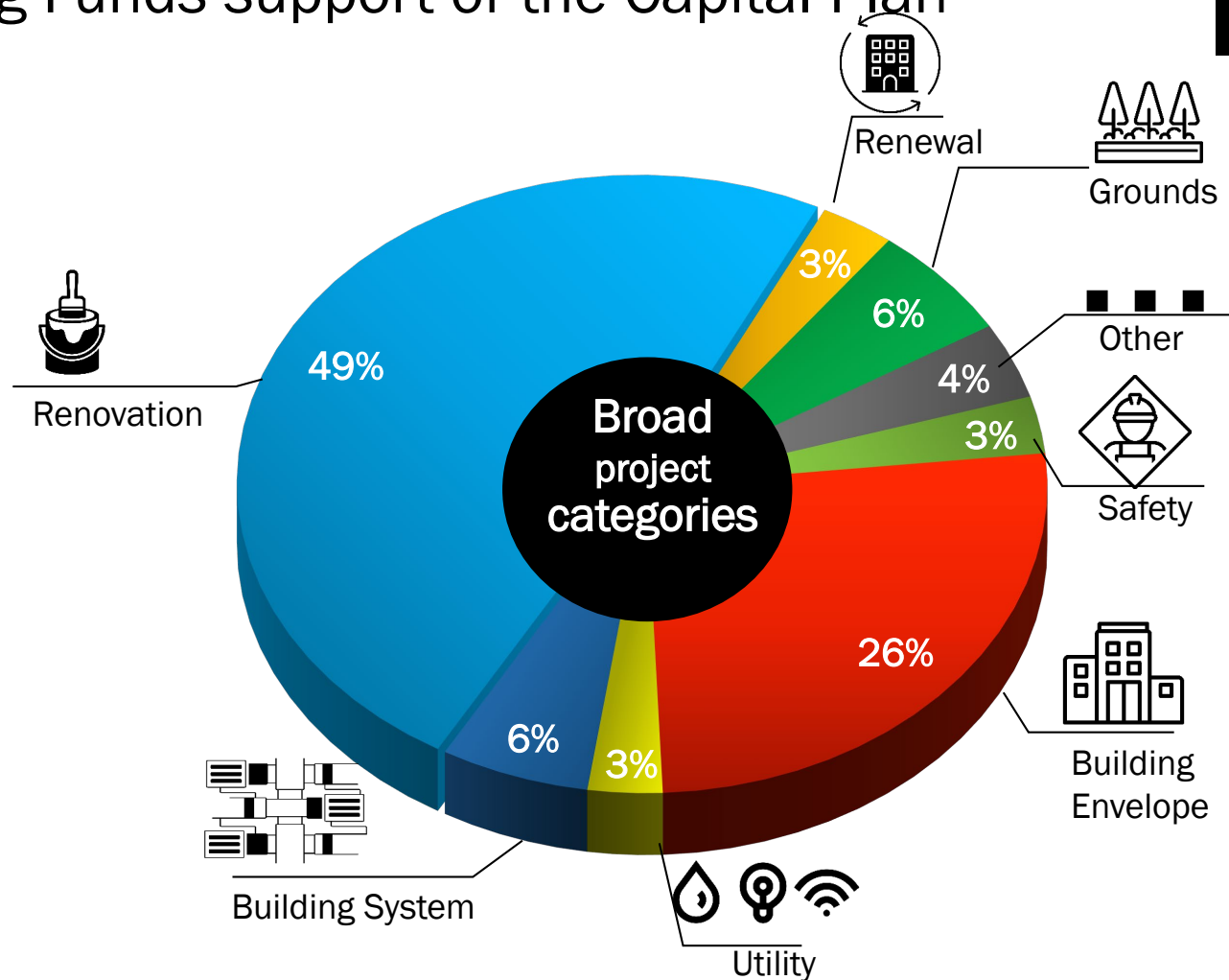


Campus	Facilities & Infrastructure	Equipment & Vehicles	Capital Reserve Deposits (utilized in FY26 or after)	TOTAL INVESTMENT
UMAINE/UMM	\$ 7,722,860	\$ 1,010,128	\$ -	\$ 8,732,988
UMA	1,297,284	75,000	-	1,372,284
UMF	604,325	115,000	104,949	824,274
UMFK	479,000	10,000	-	489,000
UMPI	403,770	-	-	403,770
USM	4,158,910	-	550,000	4,708,910
Campus Cap Projects	\$ 14,666,149	\$ 1,210,128	\$ 654,949	\$ 16,531,226
US-IT	850,000	973,315	2,003,203	3,826,518
TOTAL	\$ 15,516,149	\$ 2,183,443	\$ 2,658,152	\$ 20,357,744

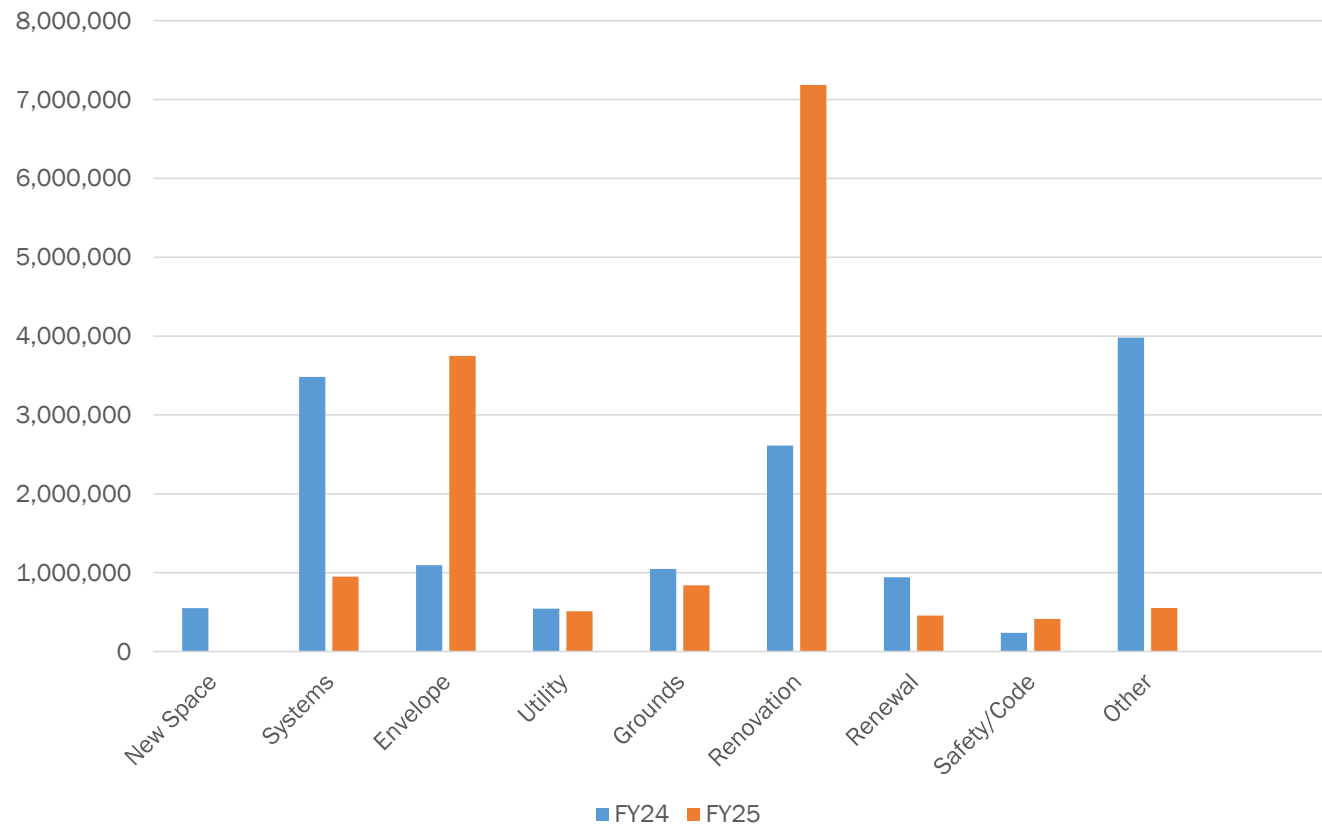
Operating Funds support of the Capital Plan

5.1

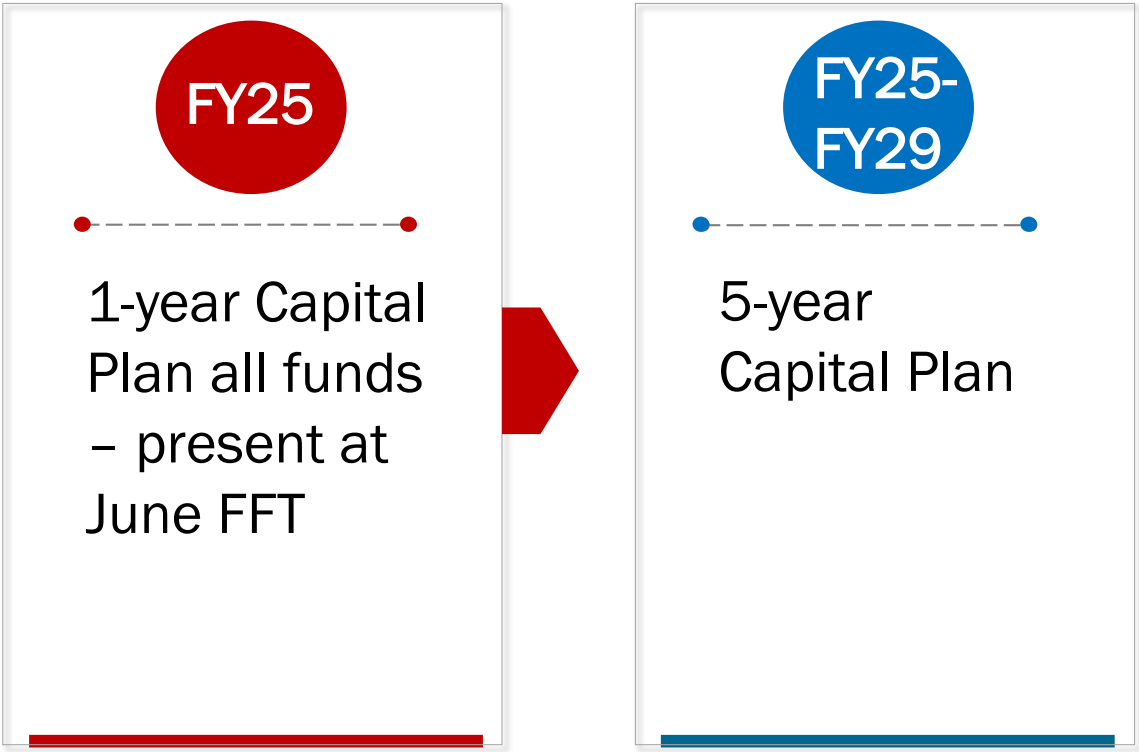
- First step in the planning process is focused on operating funds
- Historically these funds constitute approx. 10% of the capital plan
- FY25 E&G and AUX of \$14.7M



FY24 to FY25 E&G and Aux planned spending by category



Next Steps



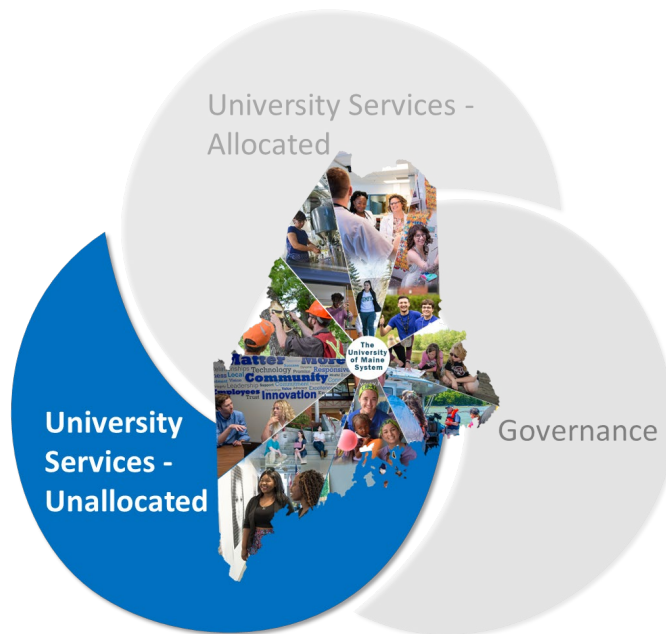
FY25 Budget

University Services – Unallocated - \$16.5 Million

5.1

Appropriation - \$14M (*\$3.6M ADC, EC, IVP; \$10.4M Strategic)

Investment Income \$2.5M



*Adult Degree Completion	1.50M
*UMS-Early College	1.65M
*Interpersonal Violence Prevention	400K
*Medical School Research	75K
UMS-Systemwide Marketing	750K
UMS-Institutional Research	500K
UMS-Research Reinvestment Funds	2.1M
Capital Planning	1.35M
Demolition	850K
Other: Diversity, Bonding, Library Ops, Exec Tran	
Financial Literacy, Distance Ed	854K
Maine Center	2.0M
Systemwide Research Support	875K
Library Software Investments	325K
Strategic Investment TBD	750K
Capital Investment	2.5M



Quasi-Independent State Entities Budget Requirement

5.1

- Public Law 2011, Chapter 616 mandates:

- Board of Trustees approval of the annual budget for travel, meals, and entertainment costs.
- Board of Trustees approval of the annual budget for contribution expenses – defined by this Public Law as membership dues & fees, gifts, donations, and sponsorships.
- Periodic reporting of the actual travel and contribution costs by the UMS to the Board of Trustees.
- Annual reporting to the Legislature by the UMS of contributions made to persons in the preceding year that were greater than \$1,000, and the total contributed to each.

FY25 Budget

(\$000's)

Fund	Travel, Meals, Entertainment	Memberships, Gifts, Donations, & Sponsorships
E&G/Auxiliary	\$8,275	\$ 1,097
Restricted/Other	4,795	732
Total	\$13,070	\$ 1,829

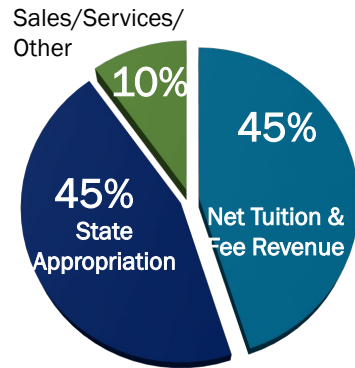
E&G/Auxiliary are included in the proposed operating budgets. Restricted/Other includes grants & contracts, MEIF, Coop. Ext, etc. and is not included in the operating budgets.

- UMS "Use of University funds" policy generally prohibits charitable contributions; Sponsorships which advance the University's mission are allowed. UMS "Travel & Expense" policy defines what constitutes allowable travel, meals, and entertainment expenses.

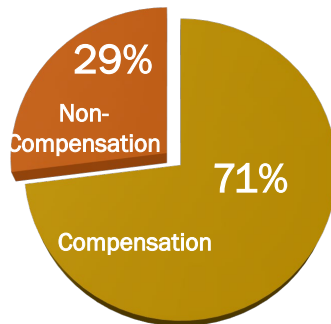


FY25 Proposed Budget: E&G

FY25 Revenue



FY25 Expense



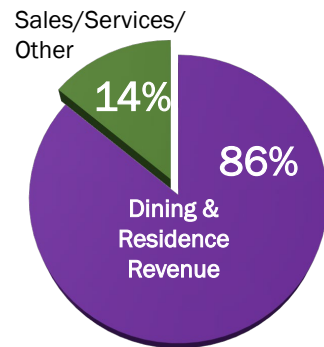
	FY24 BASE	FY25 BASE	BUDGET CHANGE	
Revenues				
Tuition & Fee Revenue	\$ 322,990,724	\$ 334,184,554	\$ 11,193,830	3.5%
Tuition Waivers/Scholarships	(90,278,842)	(89,050,994)	1,227,848	-1.4%
Net Student Charges Revenue	232,711,882	245,133,560	12,421,678	5.3%
State Appropriation	229,563,631	239,938,728	10,375,097	4.5%
Indirect Cost Recovery	25,858,985	27,009,985	1,151,000	4.5%
Investment Income/Gifts	4,047,173	4,435,894	388,721	9.6%
Sales/Services/Auxiliary	20,247,160	23,033,536	2,786,376	13.8%
Total Revenue	512,428,831	539,551,703	27,122,872	5.3%
Expenses				
Compensation (net of attrition)	389,620,506	393,578,403	3,957,897	1.0%
Fuel & Electricity	18,990,737	17,846,972	(1,143,765)	-6.0%
Supplies & Services	40,007,257	45,825,745	5,818,488	14.5%
Shared Services	(627,515)	(95,457)	532,058	-84.8%
Travel	7,220,596	8,213,526	992,930	13.8%
Memberships/ Contributions	1,136,690	1,084,627	(52,064)	-4.6%
Maintenance & Alterations	12,082,292	12,578,427	496,135	4.1%
Interest	2,079,683	2,005,604	(74,079)	-3.6%
Depreciation	37,431,225	40,368,162	2,936,937	7.8%
Other Expenses	10,469,686	11,491,769	1,022,084	9.8%
Unassigned Budget	584,458	1,106,468	522,010	89.3%
Transfers to/(from) MAFES/CES	12,080,893	11,514,724	(566,169)	-4.7%
Transfers to/(from) MEIF	5,650,262	5,314,415	(335,847)	-5.9%
Transfers - Other	503,576	6,010,732	5,507,156	1093.6%
Total Expenses & Transfers	537,230,346	556,844,117	19,613,770	3.7%
Operating Increase (Decrease)	\$ (24,801,515)	\$ (17,292,414)	\$ 7,509,101	-30.3%
Modified Cash Flow				
Add Back Depreciation	37,431,225	40,368,162	2,936,937	7.8%
Less Capital Expenditures	(14,198,426)	(15,153,905)	(955,479)	6.7%
Less Capital Reserve Funding	(1,991,557)	(2,628,203)	(636,646)	32.0%
Less Debt Service Principal	(6,565,495)	(6,800,901)	(235,406)	3.6%
Net Change Before Other Adjustment:	(10,125,768)	(1,507,260)	8,618,508	
Transfer from/(to) Strategic Rsrv	340,000	-	(340,000)	
Transfer from/(to) Budget Stabilization	500,000	-	(500,000)	
Other Transfers from/(to) Reserves	9,186,771	5,310,960	(3,875,811)	
Net Change in Cash & Rsrv Transfers	\$ (98,997)	\$ 3,803,700	\$ 3,902,697	

5.1

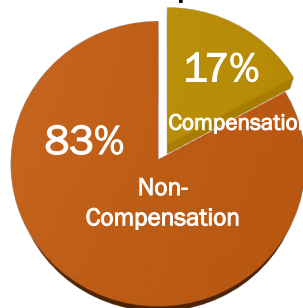


FY25 Proposed Budget: Auxiliary

FY25 Revenue



FY25 Expense



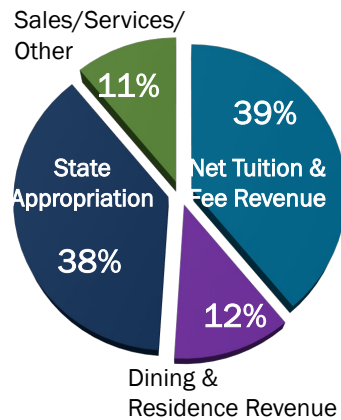
	FY24 BASE	FY25 BASE	BUDGET CHANGE	
Revenues				
Tuition & Fee Revenue	\$ 1,000,000	\$ 1,050,000	\$ 50,000	5.0%
Dining Revenue	30,055,831	32,483,885	2,428,054	8.1%
Residence Revenue	44,172,202	46,670,094	2,497,892	5.7%
Tuition Waivers/Scholarships	(2,744,739)	(2,937,004)	(192,265)	7.0%
Net Student Charges Revenue	72,483,294	77,266,975	4,783,681	6.6%
Sales/Services/Auxiliary	10,788,740	12,752,133	1,963,393	18.2%
Total Revenue	83,272,034	90,019,108	6,747,074	8.1%
Expenses				
Compensation (net of attrition)	15,879,544	15,834,880	(44,664)	-0.3%
Fuel & Electricity	6,760,984	8,388,914	1,627,930	24.1%
Supplies & Services	31,088,718	35,460,808	4,372,090	14.1%
Shared Services	67,854	74,550	6,696	9.9%
Travel	5,325	61,559	56,234	1056.0%
Memberships/ Contributions	9,381	12,244	2,863	30.5%
Maintenance & Alterations	4,238,631	4,188,361	(50,270)	-1.2%
Interest	6,596,380	6,443,537	(152,843)	-2.3%
Depreciation	6,863,456	8,680,706	1,817,250	26.5%
Other Expenses	6,815,070	7,421,406	606,336	8.9%
Unassigned Budget	118,197	118,197	-	0.0%
Transfers - Other	5,005,406	5,078,495	73,089	1.5%
Total Expenses & Transfers	83,448,946	91,763,658	8,314,712	10.0%
Operating Increase (Decrease)	\$ (176,912)	\$ (1,744,550)	\$ (1,567,638)	886.1%
Modified Cash Flow				
Add Back Depreciation	6,863,456	8,680,706	1,817,250	26.5%
Less Capital Expenditures	(2,705,736)	(2,545,687)	160,049	-5.9%
Less Capital Reserve Funding	(3,982)	(29,949)	(25,967)	652.1%
Less Debt Service Principal	(5,554,316)	(5,243,092)	311,224	-5.6%
Net Change Before Other Trans	(1,577,490)	(882,572)	694,918	
From/(to) Budget Stabilization	214,628	-	(214,628)	
Other Transfers from/(to) Reserves	1,395,618	-	(1,395,618)	
Net Chng- Cash & Resrv Transfers	\$ 32,756	\$ (882,572)	\$ (915,328)	

5.1

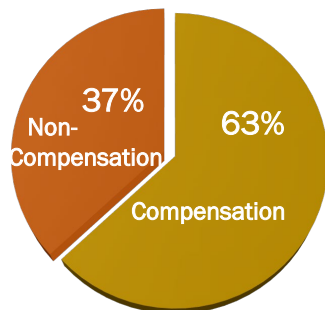


FY25 Proposed Budget: E&G and Auxiliary

FY25 Revenue



FY25 Expense



	FY24 BASE	FY25 BASE	BUDGET CHANGE	
Revenues				
Tuition & Fee Revenue	\$ 323,990,724	\$ 335,234,554	\$ 11,243,830	3.5%
Dining Revenue	30,055,831	32,483,885	2,428,054	8.1%
Residence Revenue	44,172,202	46,670,094	2,497,892	5.7%
Tuition Waivers/Scholarships	(93,023,581)	(91,987,998)	1,035,583	-1.1%
Net Student Charges Revenue	305,195,176	322,400,535	17,205,359	5.6%
State Appropriation	229,563,631	239,938,728	10,375,097	4.5%
Indirect Cost Recovery	25,858,985	27,009,985	1,151,000	4.5%
Investment Income/Gifts	4,047,173	4,435,894	388,721	9.6%
Sales/Services/Auxiliary	31,035,900	35,785,669	4,749,769	15.3%
Total Revenue	595,700,865	629,570,811	33,869,946	5.7%
Expenses				
Compensation (net of attrition)	405,500,050	409,413,283	3,913,233	1.0%
Fuel & Electricity	25,751,721	26,235,886	484,165	1.9%
Supplies & Services	71,095,975	81,286,553	10,190,578	14.3%
Shared Services	(559,661)	(20,907)	538,754	-96.3%
Travel	7,225,921	8,275,085	1,049,164	14.5%
Memberships/Contributions	1,146,071	1,096,871	(49,201)	-4.3%
Maintenance & Alterations	16,320,923	16,766,788	445,865	2.7%
Interest	8,676,063	8,449,141	(226,922)	-2.6%
Depreciation	44,294,681	49,048,868	4,754,187	10.7%
Other Expenses	17,284,756	18,913,175	1,628,420	9.4%
Unassigned Budget	702,655	1,224,665	522,010	74.3%
Transfers to/(from) MAFES/CES	12,080,893	11,514,724	(566,169)	-4.7%
Transfers to/(from) MEIF	5,650,262	5,314,415	(335,847)	-5.9%
Transfers - Other	5,508,982	11,089,227	5,580,245	101.3%
Total Operating Expenses & Transfers	620,679,292	648,607,774	27,928,482	4.5%
Operating Increase (Decrease)	\$ (24,978,427)	\$ (19,036,963)	\$ 5,941,464	-23.8%
Modified Cash Flow				
Add Back Depreciation	44,294,681	49,048,868	4,754,187	10.7%
Less Capital Expenditures	(16,904,162)	(17,699,592)	(795,430)	4.7%
Less Capital Reserve Funding	(1,995,539)	(2,658,152)	(662,613)	33.2%
Less Debt Service Principal	(12,119,811)	(12,043,993)	75,818	-0.6%
Net Change Before Other Transfers	(11,703,258)	(2,389,832)	9,313,426	
From/(to) Strategic Rsrv	340,000	-	(340,000)	
From/(to) Budget Stabilization	714,628	-	(714,628)	
Other Transfers from/(to) Reserves	10,582,389	5,310,960	(5,271,429)	
Net Change in Cash & Rsrv Transfers	\$ (66,241)	\$ 2,921,128	\$ 2,987,369	

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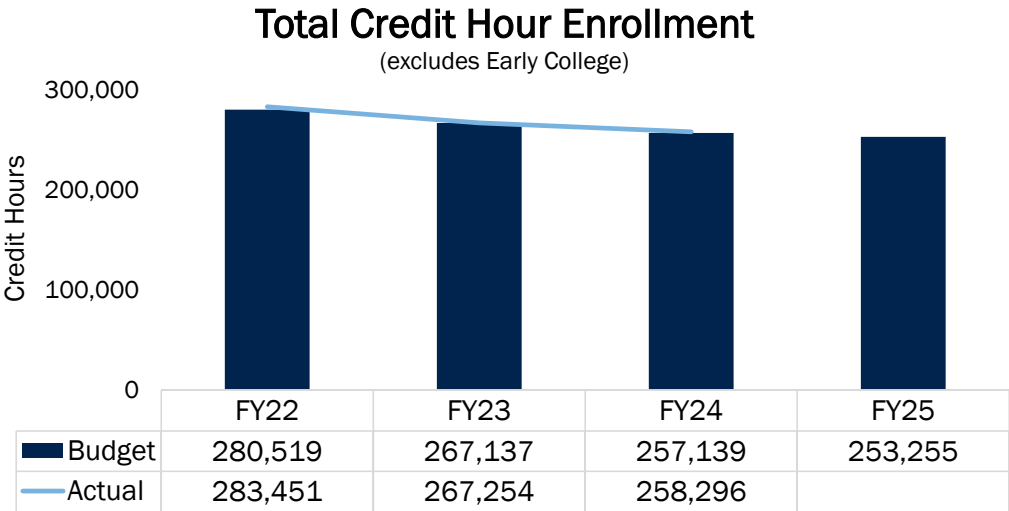
Appendix

5.1

- Detailed Information by Campus for FY25:
 - Enrollment & Residence Hall Occupancy
 - Campus Efficiencies
 - Operating Budgets
 - Student Cost Report



UMaine Enrollment



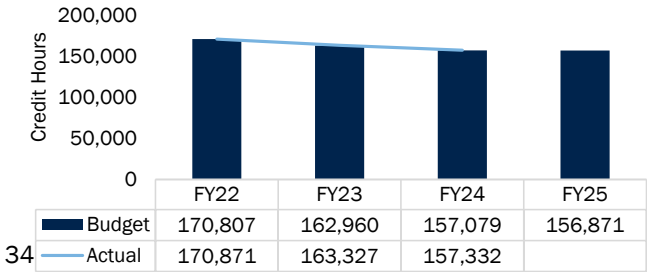
FY25 Enrollment Budget

Budget	Actual
-1.5% below FY24	-2.0% below FY24
↓	↓

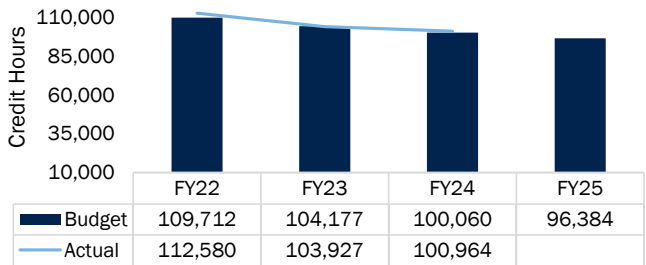


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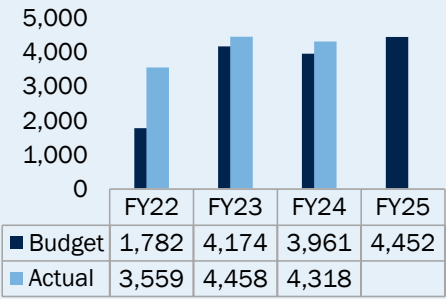
In-State (excludes EC)



Out-of-State

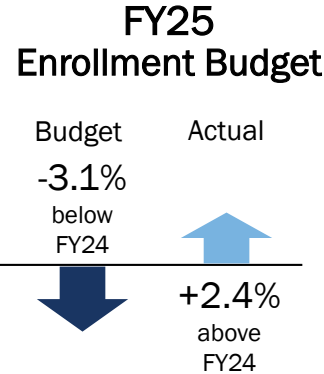
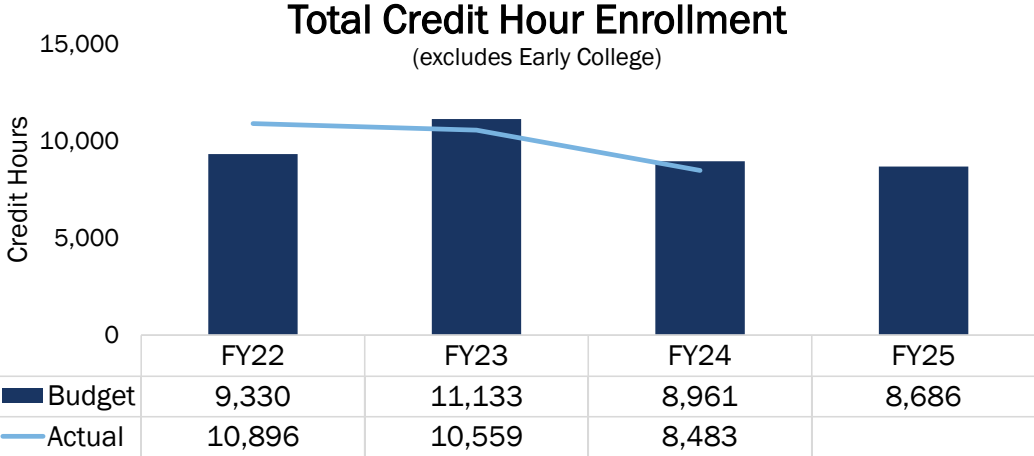


Early College



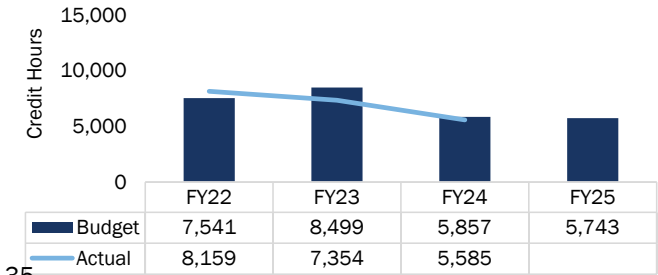


UMM Enrollment

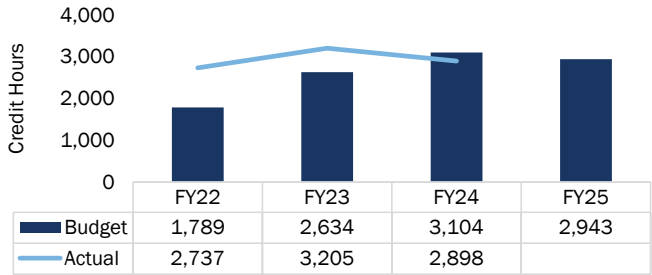


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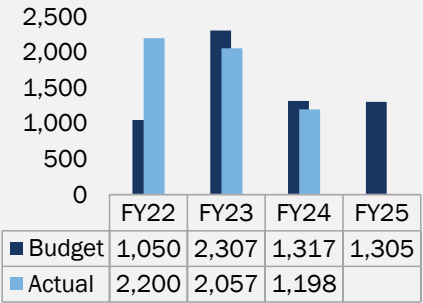
In-State (excludes EC)



Out-of-State

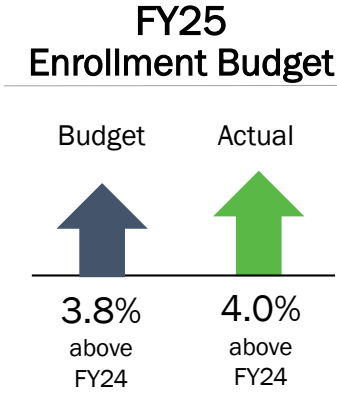
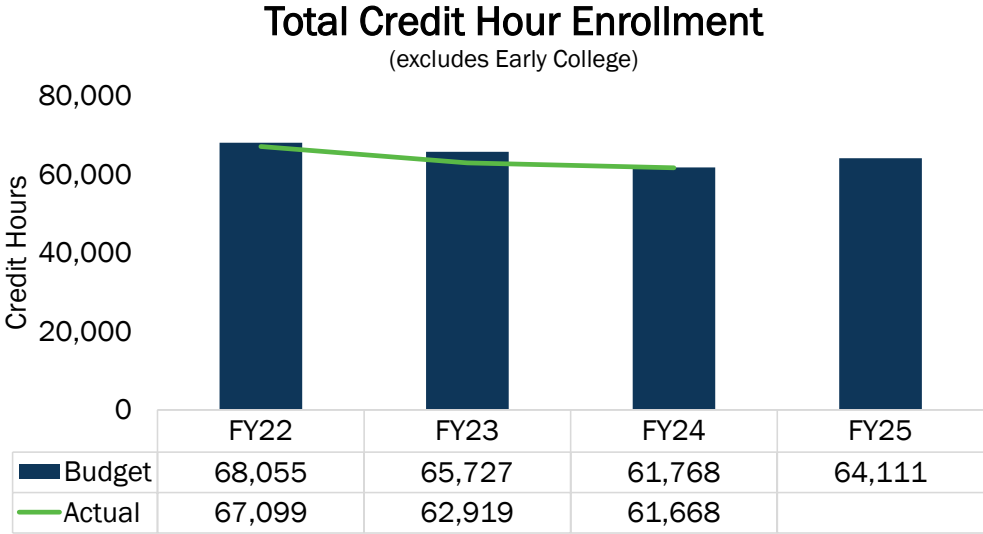


Early College

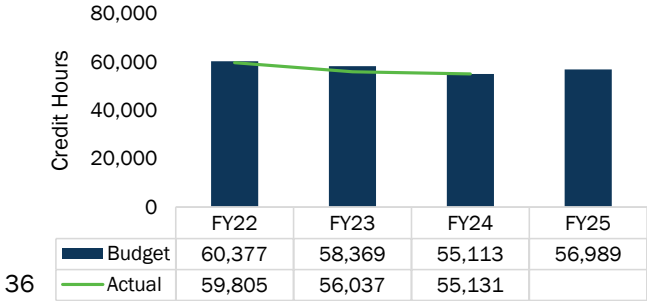




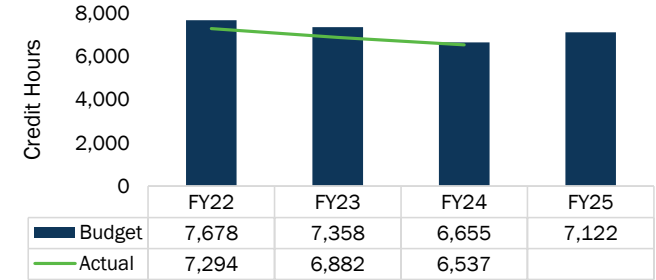
UMA Enrollment



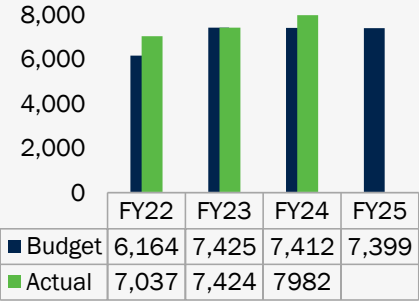
In-State (excludes EC)



Out-of-State

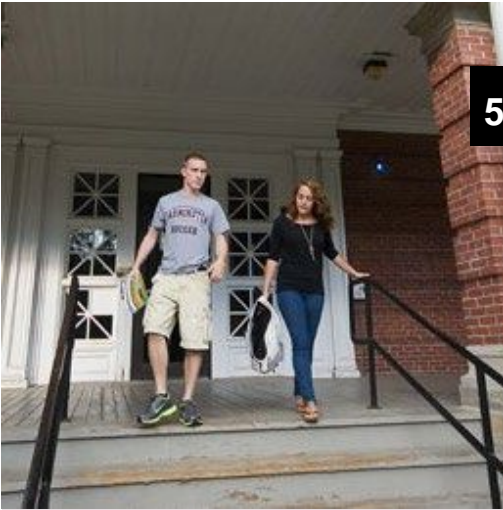
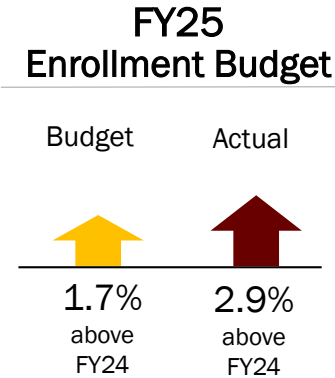
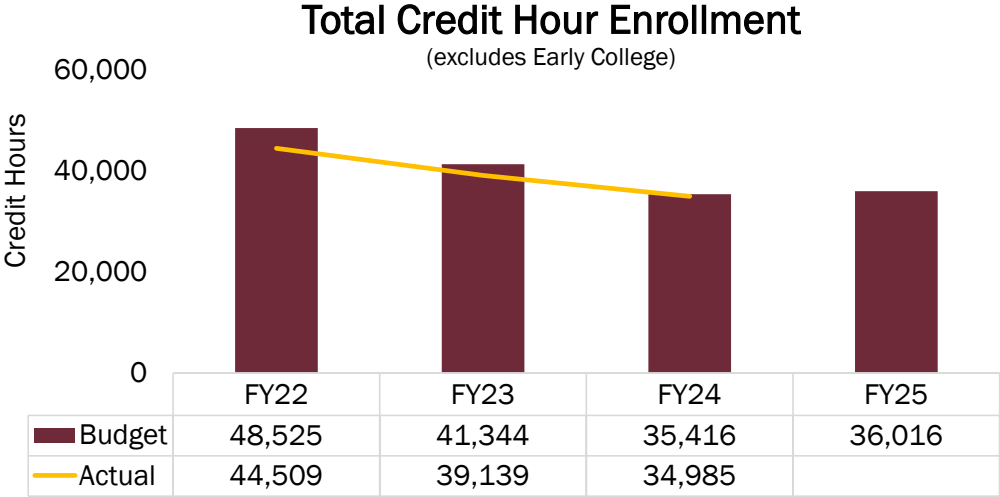


Early College

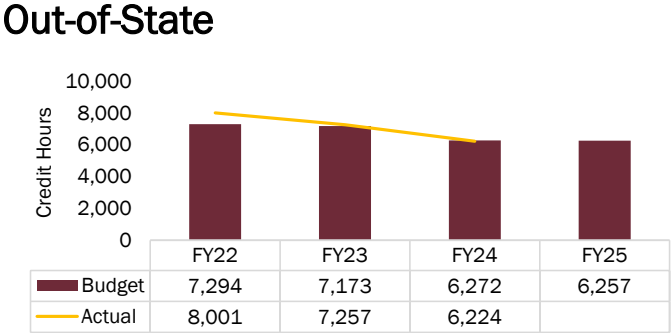
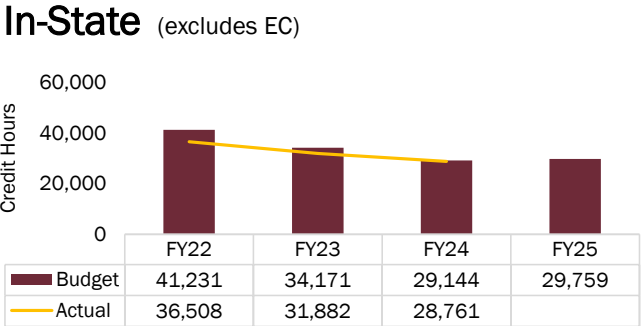




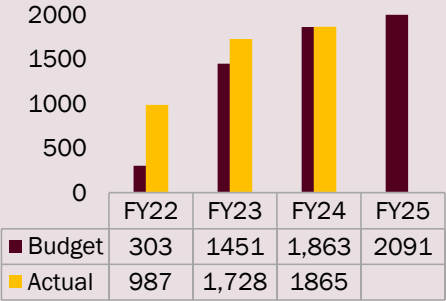
UMF Enrollment



5.1



Early College

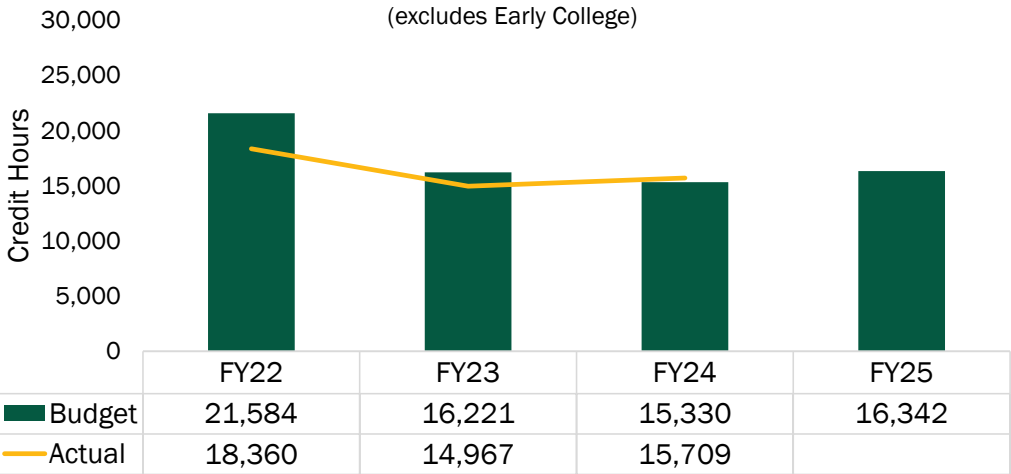




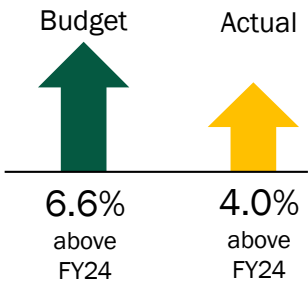
UMFK Enrollment

Total Credit Hour Enrollment

(excludes Early College)

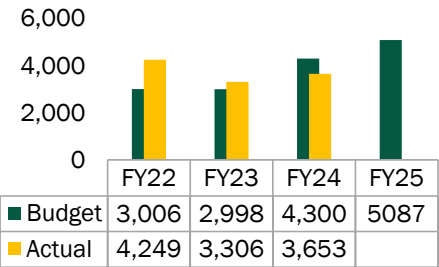


FY25 Enrollment Budget

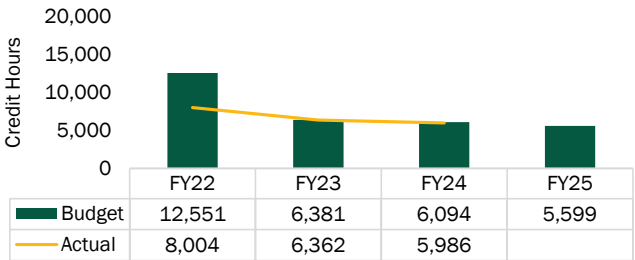


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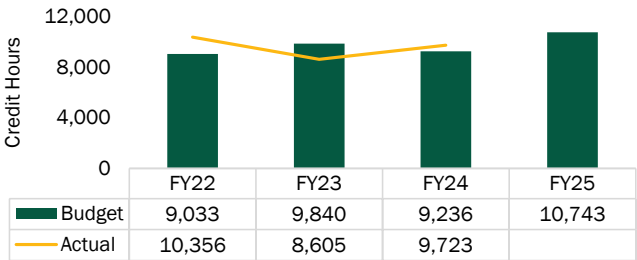
Early College



In-State (excludes EC)



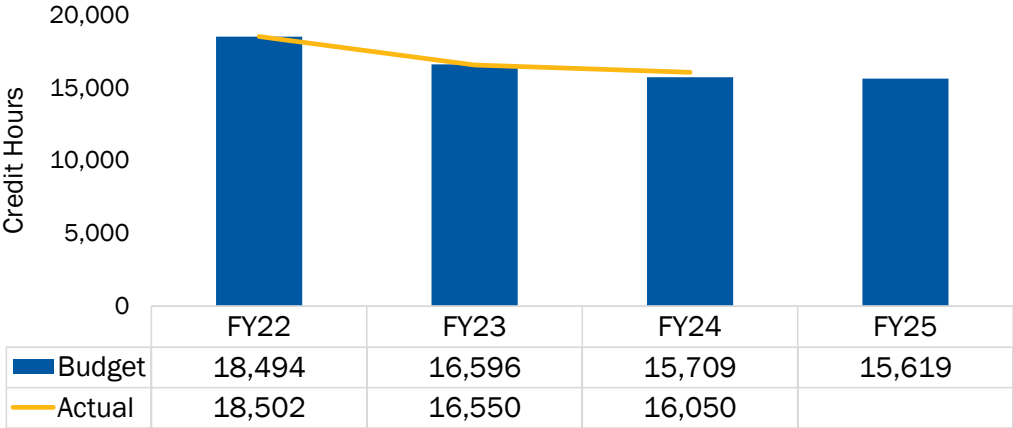
Out-of-State





UMPI Enrollment

Total Credit Hour Enrollment (excludes Early College & YourPace)



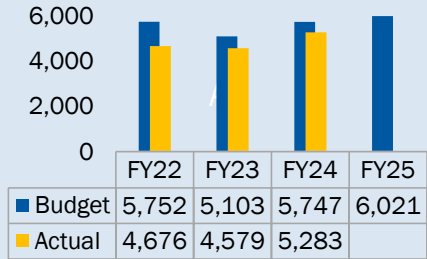
FY25 Enrollment Budget

Budget	Actual
-0.6% below FY24	-2.7% below FY24

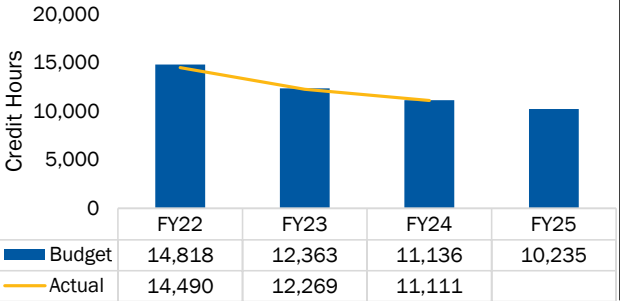


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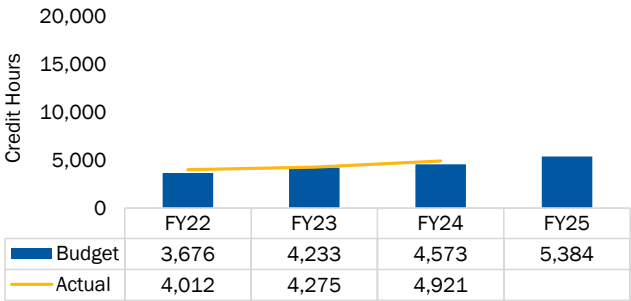
Early College



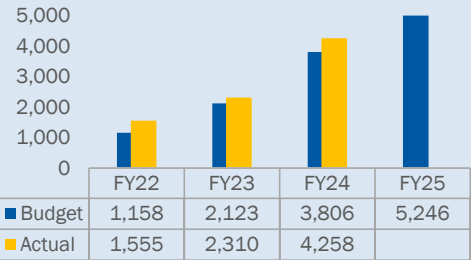
In-State (excludes EC)



Out-of-State (excludes YourPace)



YourPace Subscriptions

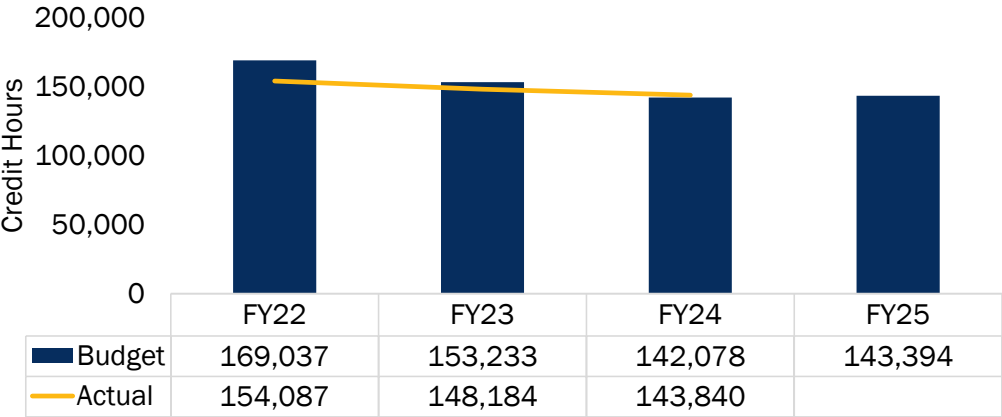


Actuals are at end of term vs. at census due to the timing of session II enrollment.

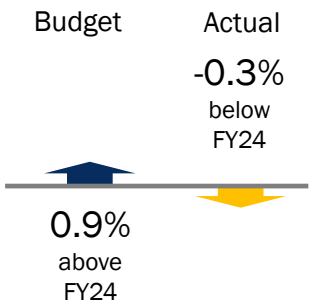


USM Enrollment

Total Credit Hour Enrollment (excludes Early College)

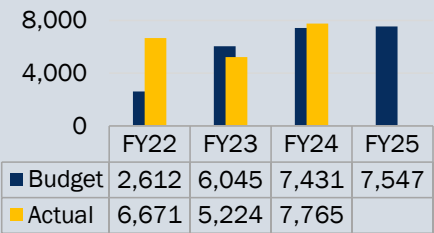


FY25 Enrollment Budget

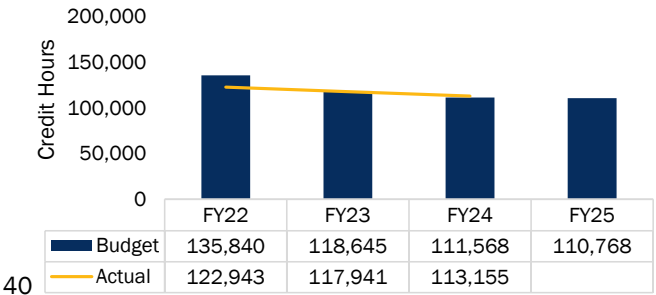


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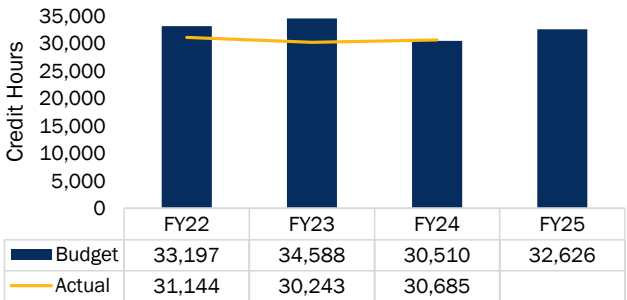
Early College



In-State (excludes EC)



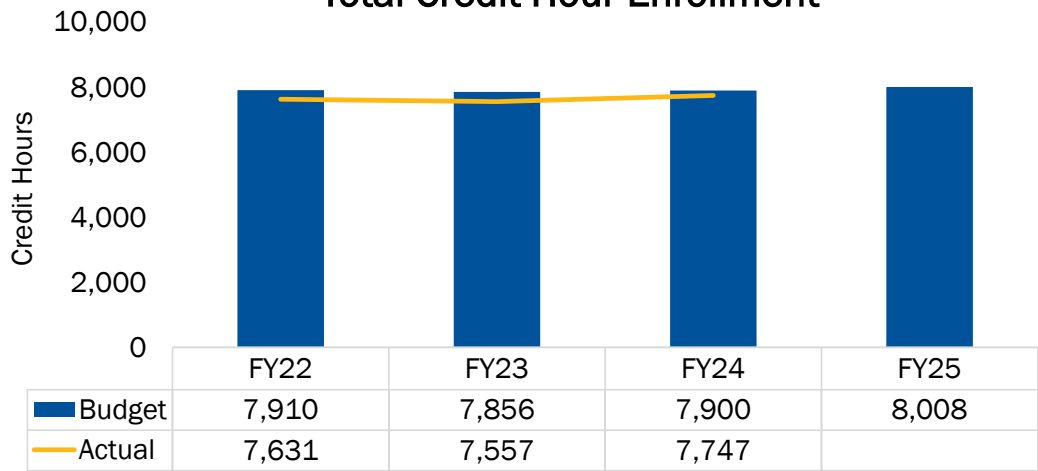
Out-of-State



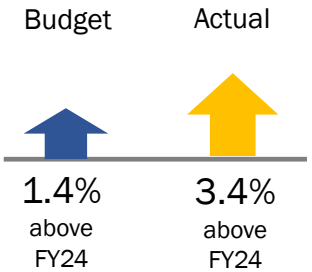


Maine Law Enrollment

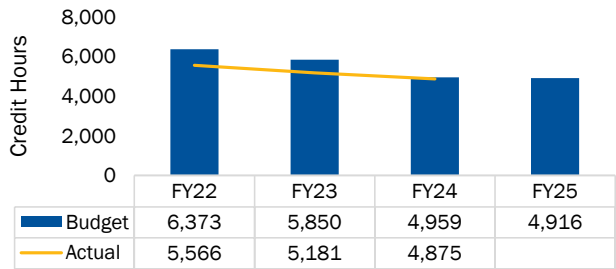
Total Credit Hour Enrollment



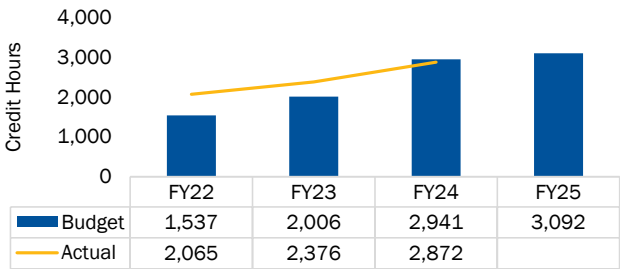
FY25 Enrollment Budget



In-State

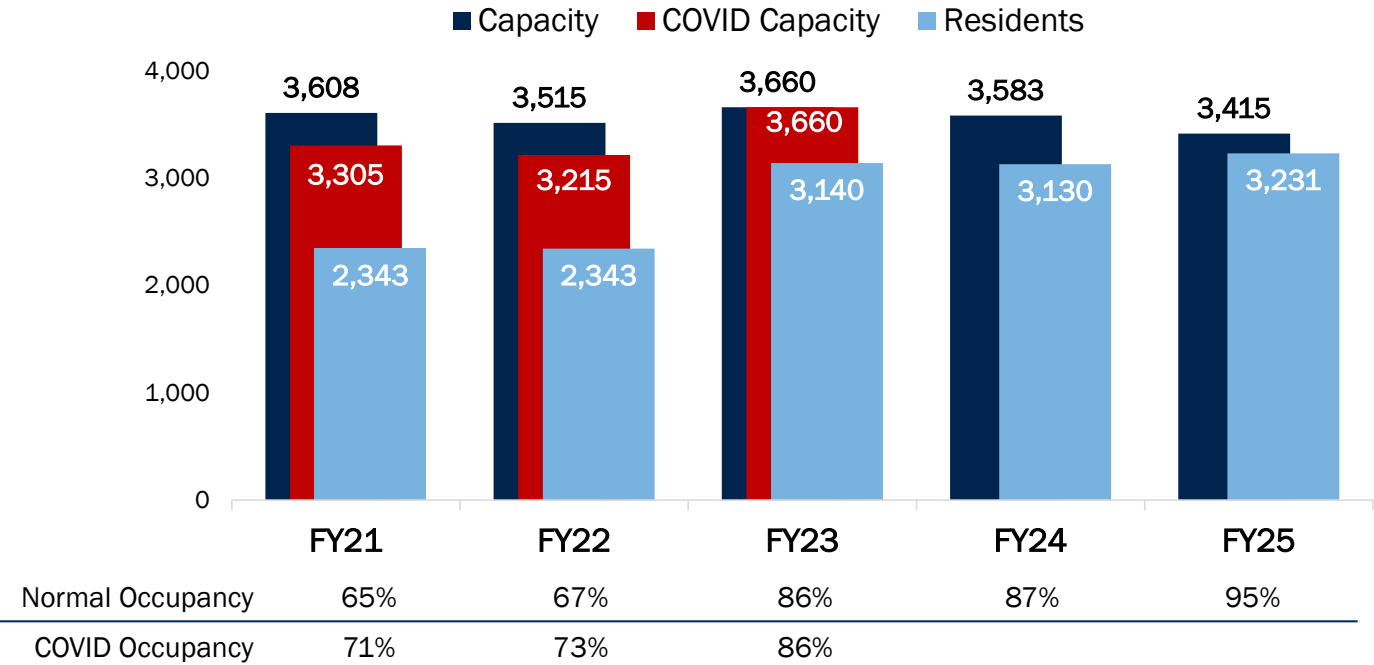


Out-of-State





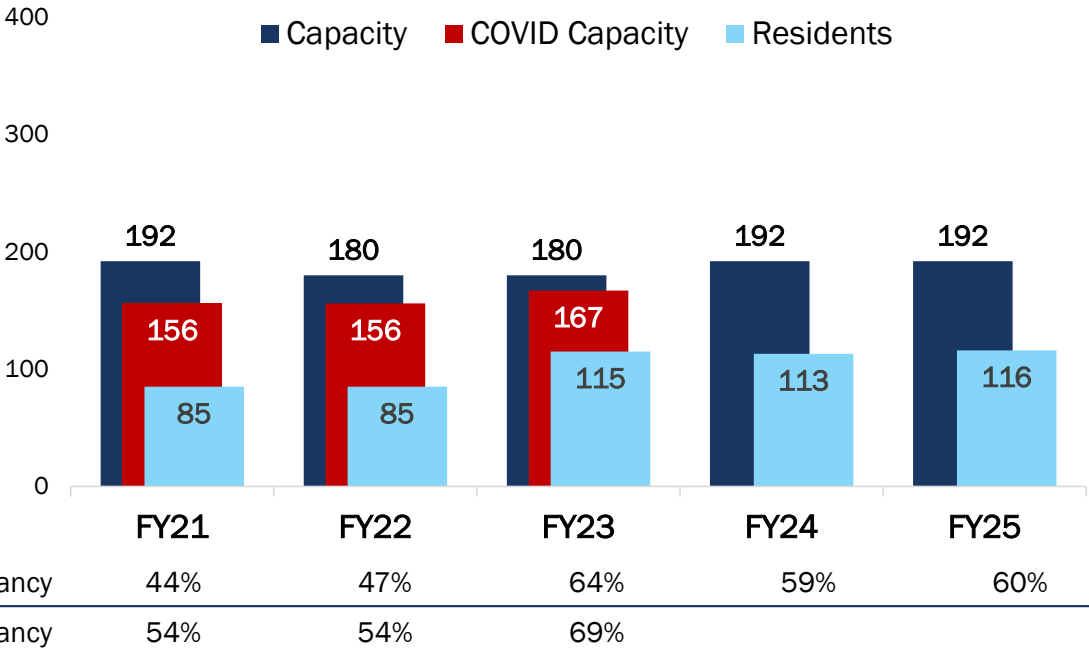
Residence Hall Occupancy (Annual Average)



5.1



Residence Hall Occupancy (Annual Average)

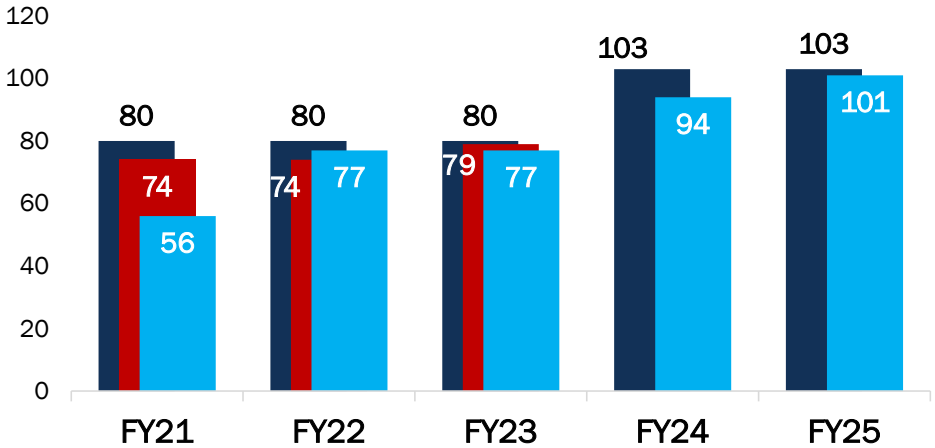




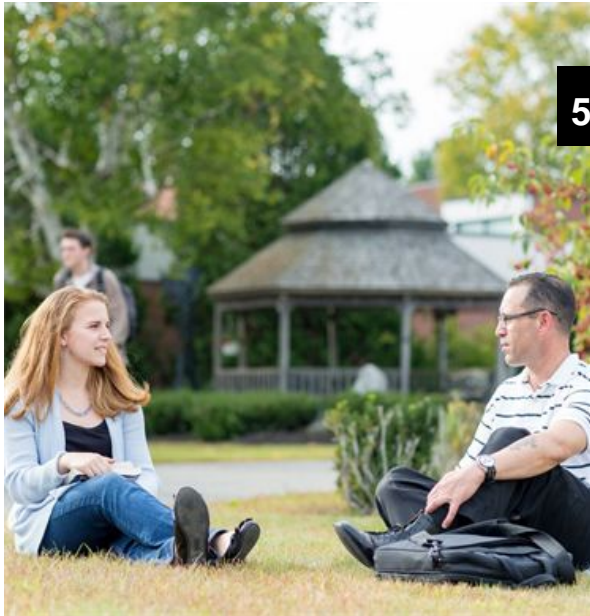
Residence Hall Occupancy (Annual Average)



■ Capacity ■ COVID Capacity ■ Residents

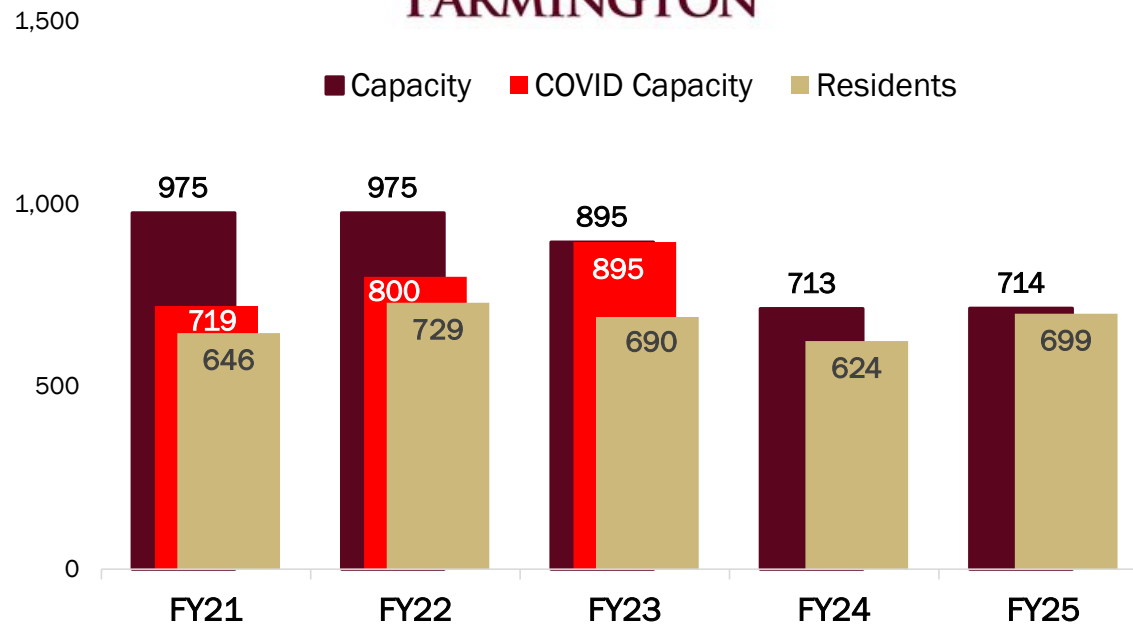


Normal Occupancy	FY21	FY22	FY23	FY24	FY25
	70%	96%	96%	91%	98%
COVID Occupancy	76%	104%	97%		

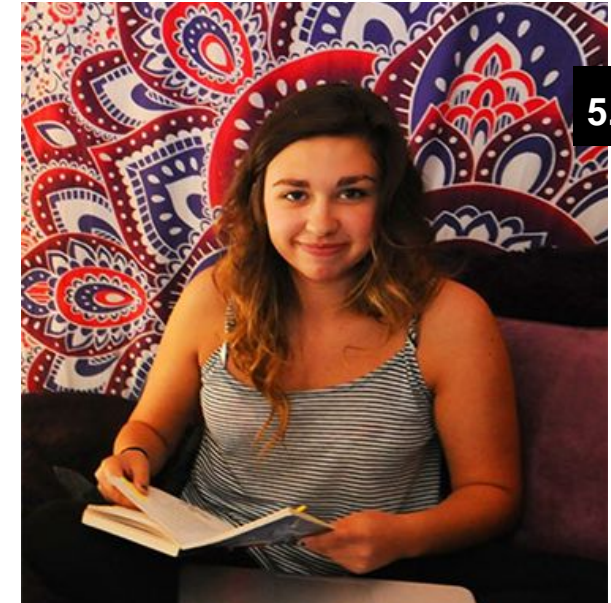




Residence Hall Occupancy (Annual Average)



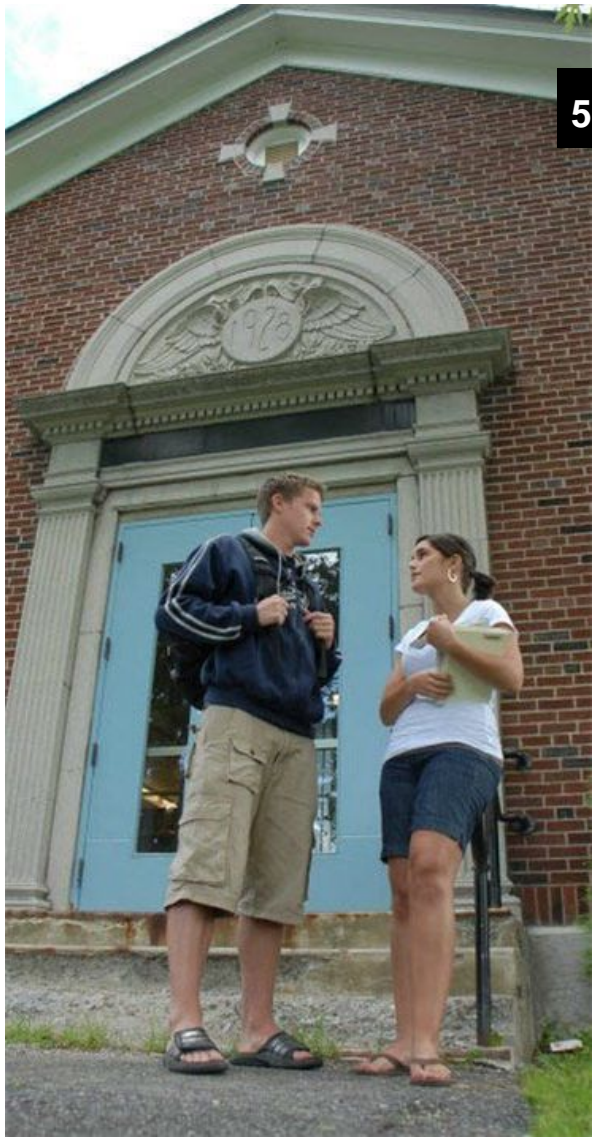
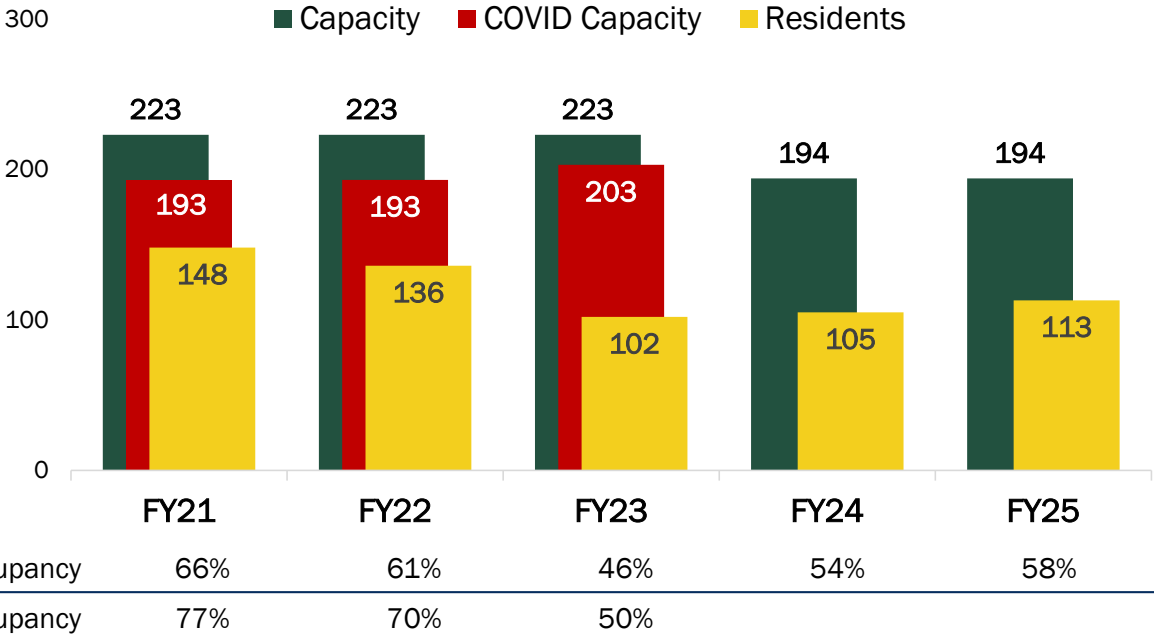
Normal Occupancy	66%	75%	77%	88%	98%
COVID Occupancy	90%	91%	100%		



5.1

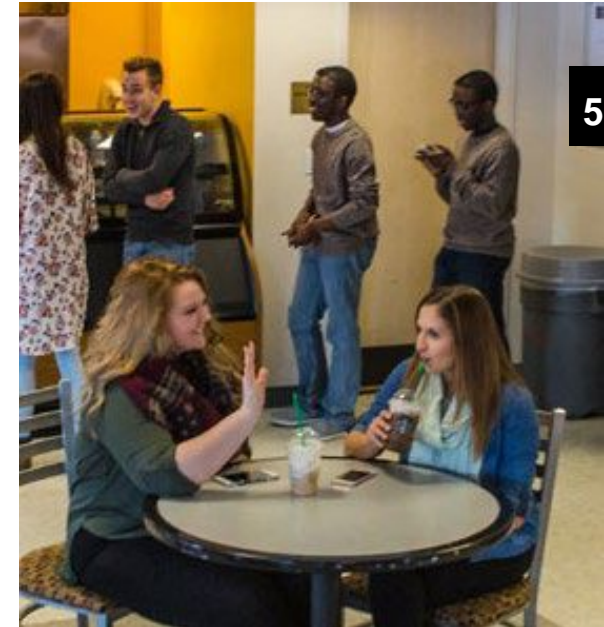
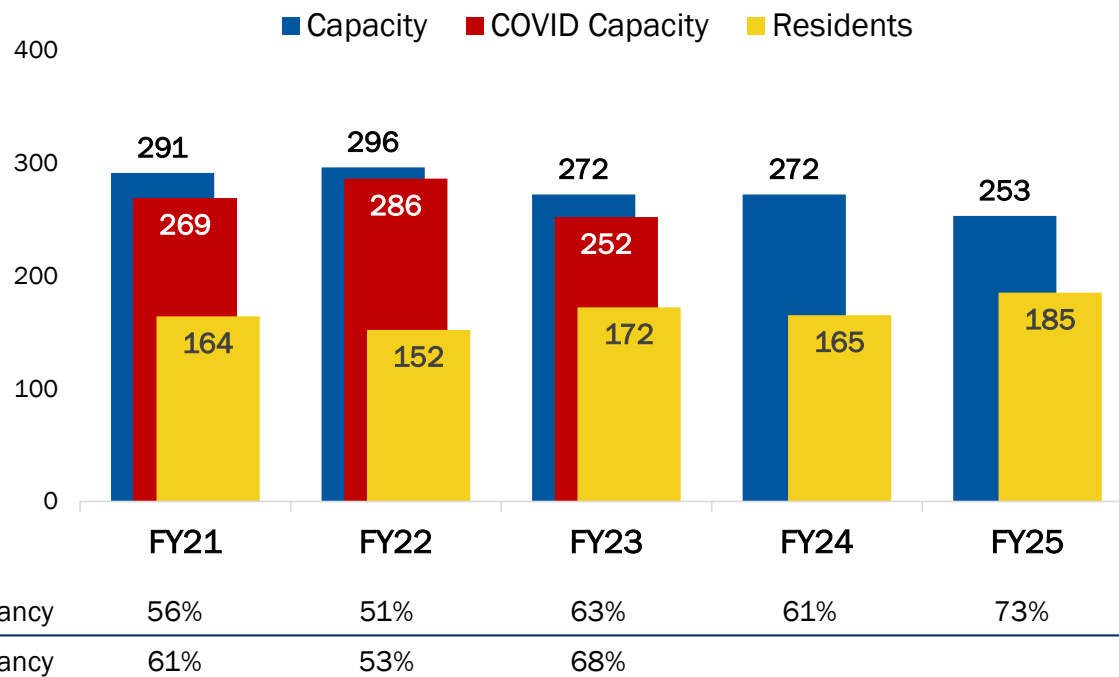


Residence Hall Occupancy (Annual Average)





Residence Hall Occupancy (Annual Average)

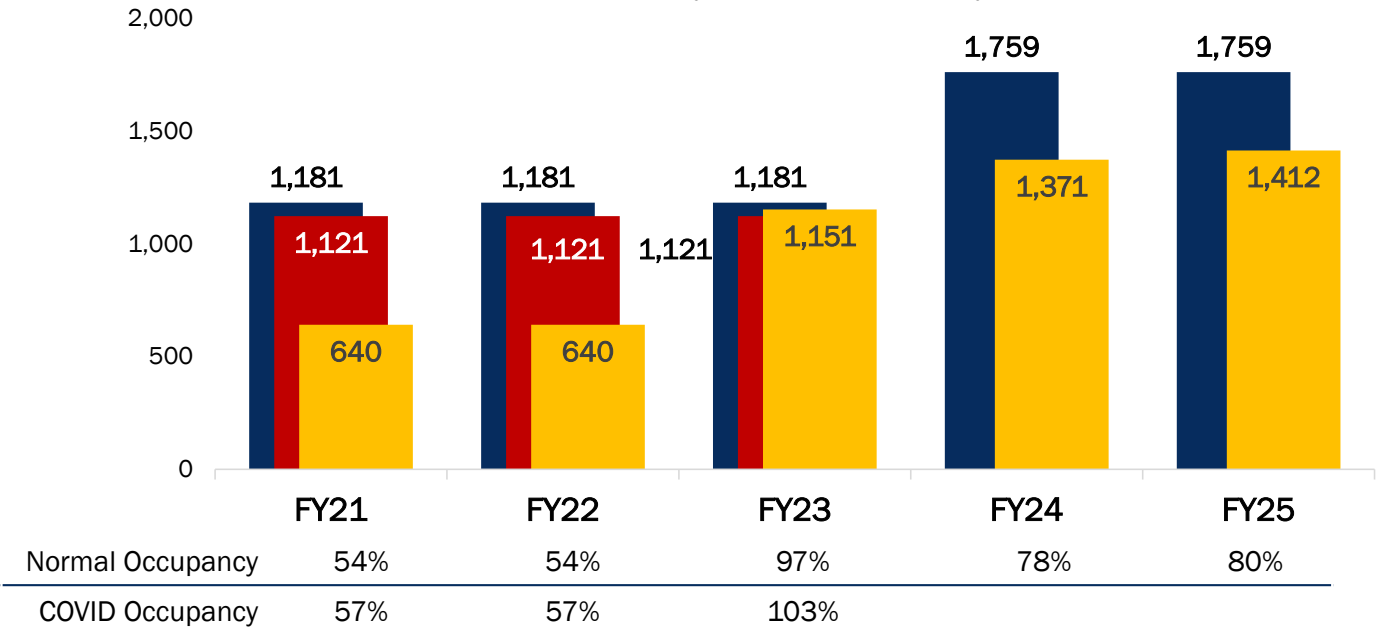




Residence Hall Occupancy (Annual Average)



■ Capacity ■ COVID Capacity ■ Residents





UMaine and UMM Efficiencies & Opportunities, FY25



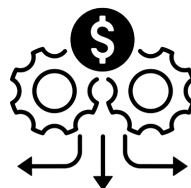
5.1



Organizational Effectiveness (-)

Consolidating administrative positions through attrition in financial services, auxiliaries, facilities, and marketing & communications (~\$1.4M)

Managing faculty retirement incentive program replacements and part-time faculty re-alignments (~\$1.7M)



Operational Efficiencies (-)

Centralizing purchasing of IT equipment and software (\$300K)

Installing energy-efficient lighting and leveraging energy credits (\$1.6M)

Renegotiating UMM Sodexo contract rider to cost of sales (\$113K)



Growth Opportunities (+)

Growth in research productivity driving Increased indirect cost return (\$1.2M)

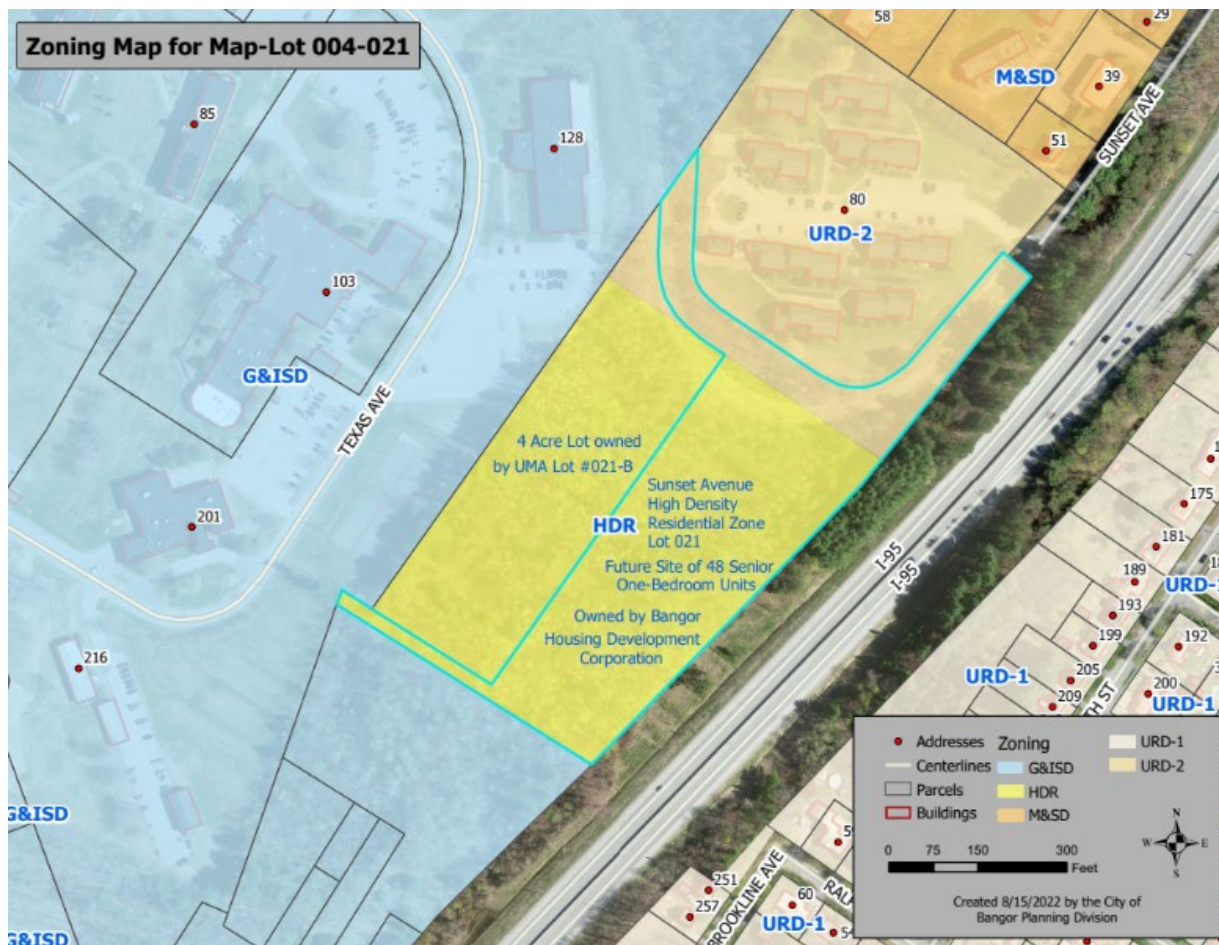
Sales/service/auxiliary programming, including activating use of facilities for summer (\$2.3M)

Equitable access to course textbooks (\$500K)

Sodexo capital investment (\$8.8M FY24-26)

*Attrition not including benefits

UMA Efficiencies—Operational & Energy



FY24 Initiatives:

- HVAC Improvements (approx. \$25,000 annual savings)
- LED Lights (approx. \$8,000 annual savings)
- Energy Audit – TRANE & CPPM - TBD
- Space Committee - TBD
- Bangor Land Sale (\$160,000 sale price)

FY25 Plans

- Energy Audit – Implementation (Unbudgeted strategic funds)
- Belfast Hall Window Replacement (\$375,000 NAV Bond)
- Continued HVAC Improvements & LED lighting upgrades (\$325,000 E&G and Bond)
- Charging Stations (\$68,330 E&G)
- Solar Panel Feasibility Study (Unbudgeted strategic funds)
- Updated Building Schematics (Unbudgeted strategic funds)

Efficiencies via Shared Spaces

- East Millinocket/EMCC (\$80,000 lease and salary savings)
- Lewiston-Auburn/USM (\$25,000 less than market rate)
- Brunswick
 - Hangar 6 – UMaine (\$42,000 paid to UMA annually)
 - SMCC (\$75,000 if we had to pay market rate)
- UMS utilizing UMA campus space
 - Augusta/UMS – 3,600 sq. ft. in Robinson Hall (\$36,000 @ \$10/sq. ft.)
 - Bangor/UMS – 8,300 sq ft in Lewiston Hall (\$83,000 @ \$10/sq. ft.)

UMF Reorganization of Academic Structure: *Academic Efficiencies*

5.1

- Reduction of academic departments from 9 to 3
- Deans serve as co-provosts
- Faculty who retire/resign are not replaced (with rare exceptions)
- Reduction of low-enrolled courses
- Reduction in adjuncts/overloads

Curriculum is continuing to be redesigned to create an average of 240 credit hours per semester taught by each faculty member within a program (e.g., 4 classes at 3 credits per faculty member with 20 students in each class)



Over \$1.7M in net savings

Reduction in size of administration

2020:	9 administrators
2021:	7 administrators
2022:	5 administrators
2023:	5 administrators

25% reduction in size of full-time faculty

2020:	112 faculty
2021:	106 faculty
2022:	97 faculty
2023:	84 faculty

Reduction in size of part-time faculty

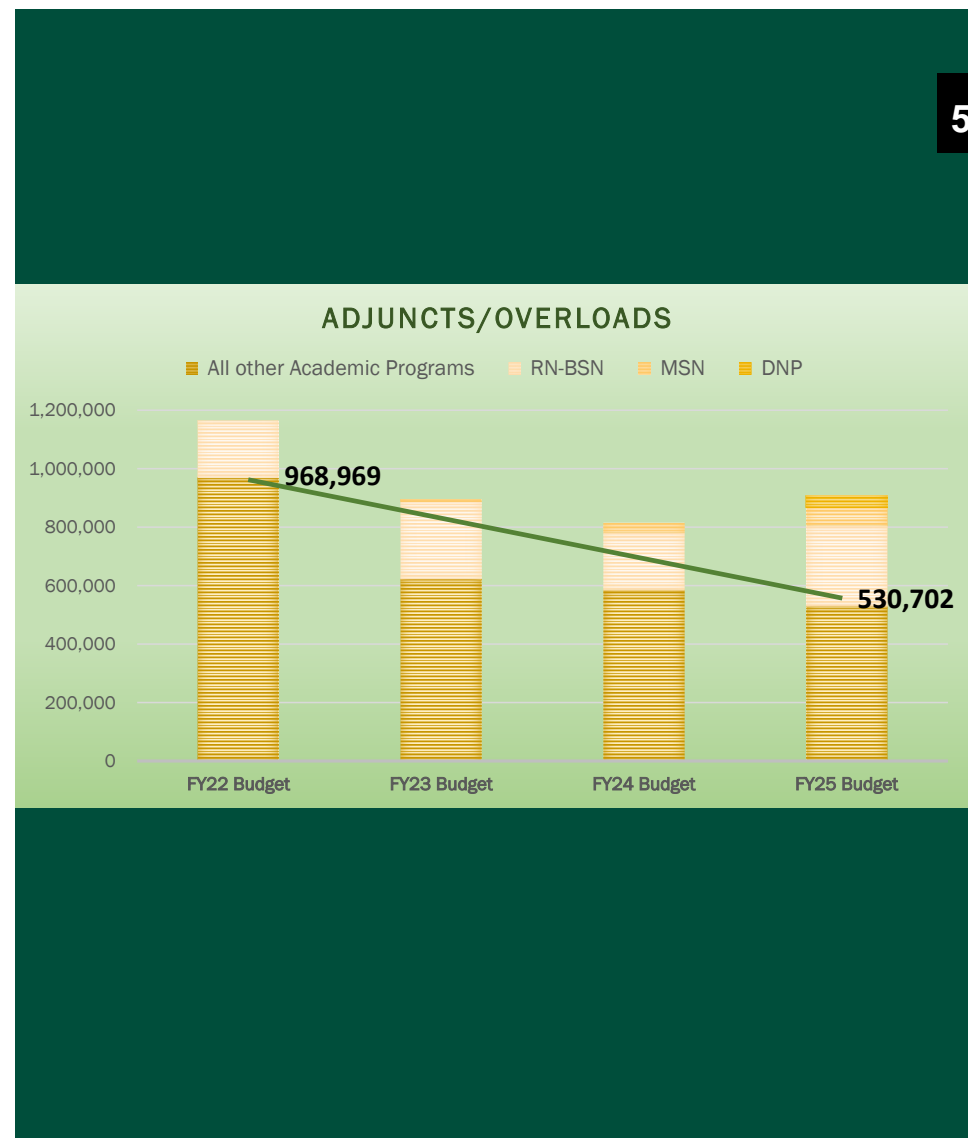
2020:	58 PATFA faculty
2021:	58 PATFA faculty
2022:	49 PATFA faculty
2023:	33 PATFA faculty

51

UMFK EFFICIENCIES

- Adjuncts/Overloads: Improved two-year course rotation, distributed courses across the week with minimal overlap and eliminated low-enrolled classes: **FY22-25 savings of \$438,267 plus benefits** (*excluding the developing online nursing programs*)
- Academic Partnerships commission: elimination resulted in **FY24-25 savings of \$357,000**
- Scholarships: Recently increased use of restricted Racino monies to fund existing and new scholarship initiatives: **FY23-24 savings of \$82,036 YTD** – (9% of budgeted scholarships & waivers)
- Budgeted Positions: Constant review of vacant positions: **FY20-25 reduction of 7.35 FTE, 7% of campus-funded positions**
- Overall Efficiency: Total Operating Expenses & Transfers: **FY24-25 decrease of 1.4%**
- Renovation thru Replacement & Space Reduction: **FY19 to date: square footage reduction of 4% and elimination of \$2.5M asset reinvestment need**

5.1



Operating Efficiencies and other Fiscal and Energy Efficiencies

- Lessening our Footprint is primary in our plan for Operating Efficiencies - HHEC and Skyway Hall.
- Our solar field with two sided panels to capture sunlight year round and from both sides of the panels. We are offsetting \$50,000 to \$60,000 annually.
- An engineering plan to change boilers in Kelley Commons and move to propane support.
- Removing Wieden oil tanks.
- Verifying the lowest possible cost for fuel oil on the System energy contract.

With the Sale or Transfer of Houlton Higher Education Center and Skyway Hall:

Campus Total Sq Ft: 407,563

HHEC: 15,622

Skyway: 9,650

New Campus Total: 382,291

6.2% decrease in sq ft.

UNIVERSITY of MAINE at PRESQUE ISLE

EXPECT an education that defies expectation.

USM Academic Efficiencies

Winter Session 2024

- Reduce
 - Duplication of courses
 - Low enrolled courses
 - Timeline to make decisions (i.e., greater communication)
- Remember
 - Budget realities
 - Populate schedule with needed classes (progression and time to degree)
- Reflect
 - What worked
 - What didn't work
 - Course Efficiencies



USM Improved Efficiencies

- Development of financial models and plans to improve operating income of auxiliary enterprises. Expecting approximately \$1,000,000 improvement over FY 2024 actuals.
- Continuation of non-compensation expense reductions throughout most units resulting in approximately \$1,400,000. Expectation of units to utilize gift funds to supplement budgets.
- Workforce management efficiencies resulting in approximately \$800,000.
- Plans to increase utilization of Lewiston campus for conferences, events; currently provide space to University of Maine Augusta.
- USM Grant – improved the administration and utilization of these funds resulting in \$500,000 reduction.



5.1

Efficiencies

Staffing

- Administrative Efficiencies: Each Department is a maximum of two FTE's deep. In some departments, there is no overlap or cross training available. **(\$240,000)**
- We have avoided duplicating several Admin services through back-up by UM and USM. **(Cost of \$25,000; avoiding new staff costs.)**
- Professors of Practice teach in core curriculum areas – Business and Criminal Law **(Savings of \$90,000 Annually)**
- Excellent Adjunct Faculty teach relevant and cutting-edge courses. **(Ave pay is \$4,000 for 3 credit course)**
- Student Fellows, Academic TA's, and Post-Grad Fellowships add depth.

Facility

- Outsource Cleaning and Security Contracts
- Worked with UMaine to sell Maine Law Clothing in their online and campus bookstore
- Lease space to UMaine Foundation **(\$211,500 in rent payments)**
- Working with the System Office to identify unified cost sharing opportunities
- Decreased costs by hosting events when possible
- Evaluating multiple RTU replacements with more energy efficient models

Academic Programs

- Working with the Maine Center to package an asynchronous MLS Degree program using existing Faculty and staff.
- Repackage current programs on the website and in marketing materials. **(TBD)**

56

5.1



Board of Trustees Meeting - Budget Committee Vote

SYSTEM TOTAL						
FY25 PROPOSED BUDGET						
	E&G and Auxiliary			Proposed		
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE	
Revenues						
Tuition & Fee Revenue	\$ 327,577,495	\$ 313,421,677	\$ 323,990,724	\$ 335,234,554	\$ 11,243,830	3.5%
Dining Revenue	30,109,442	31,783,630	30,055,831	32,483,885	2,428,054	8.1%
Residence Revenue	35,050,813	35,493,903	44,172,202	46,670,094	2,497,892	5.7%
Tuition Waivers/Scholarships	(100,802,939)	(96,609,654)	(93,023,581)	(91,987,998)	1,035,583	-1.1%
Net Student Charges Revenue	291,934,810	284,089,555	305,195,176	322,400,535	17,205,359	5.6%
State Appropriation	205,554,730	220,005,476	229,563,631	239,938,728	10,375,097	4.5%
HEERF Relief - Lost Revenue	13,824,390	1,065,090	-	-	-	-%
Indirect Cost Recovery	23,517,394	24,923,064	25,858,985	27,009,985	1,151,000	4.5%
Investment Income/Gifts	(12,697,487)	11,017,978	4,047,173	4,435,894	388,721	9.6%
Sales/Services/Auxiliary	28,407,768	30,548,497	31,035,900	35,785,669	4,749,769	15.3%
Total Revenue	550,541,606	571,649,659	595,700,865	629,570,811	33,869,946	5.7%
Expenses						
Salaries, Wages & Benefits	\$397,979,713	\$406,775,118	\$415,484,918	\$416,597,550	\$1,112,632	0.3%
Attrition (Salary Only)	-	-	(9,984,868)	(7,184,267)	2,800,601	-28.0%
Personnel	397,979,713	406,775,118	405,500,050	409,413,283	3,913,233	1.0%
Other Expenses & Transfers:						
Fuel & Electricity	19,018,037	16,841,530	25,751,721	26,235,886	484,165	1.9%
Supplies & Services	61,341,617	70,473,542	71,095,975	81,286,553	10,190,578	14.3%
Shared Services	95	512	(559,661)	(20,907)	538,754	-96.3%
Travel	5,555,807	7,925,602	7,225,921	8,275,085	1,049,164	14.5%
Memberships, Contributions & Sponsorships	1,161,454	1,100,215	1,146,071	1,096,871	(49,201)	-4.3%
Maintenance & Alterations	16,175,058	15,902,283	16,320,923	16,766,788	445,865	2.7%
Interest	4,206,999	3,952,856	8,676,063	8,449,141	(226,922)	-2.6%
Depreciation	38,636,296	40,757,288	44,294,681	49,048,868	4,754,187	10.7%
Other Expenses	15,642,240	15,860,834	17,284,756	18,913,175	1,628,420	9.4%
Unassigned Budget	13,130	7,261	702,655	1,224,665	522,010	74.3%
Transfers to/(from) MAFES/CES	13,501,367	12,261,900	12,080,893	11,514,724	(566,169)	-4.7%
Transfers to/(from) MEIF	7,276,249	5,975,913	5,650,262	5,314,415	(335,847)	-5.9%
Transfers - Other	3,223,254	6,540,217	5,508,982	11,089,227	5,580,245	101.3%
Pooled Costs - Benefits	(1,130,536)	(7,176,601)	-	-	-	-%
Pooled Costs - Insurance	221,985	(382,714)	-	-	-	-%
Total Other Expenses & Transfers	184,843,053	190,040,636	215,179,242	239,194,491	24,015,249	11.2%
Total Operating Expenses & Transfers	582,822,765	596,815,754	620,679,292	648,607,774	27,928,482	4.5%
Operating Increase (Decrease)	\$ (32,281,160)	\$ (25,166,095)	\$ (24,978,427)	\$ (19,036,963)	\$ 5,941,464	-23.8%
Modified Cash Flow						
Operating Increase (Decrease)	\$ (32,281,160)	\$ (25,166,095)	\$ (24,978,427)	\$ (19,036,963)	\$ 5,941,464	-23.8%
Add Back Depreciation	38,636,296	40,757,288	44,294,681	49,048,868	4,754,187	10.7%
Less Capital Expenditures	(13,370,956)	(17,766,036)	(16,904,162)	(17,699,592)	(795,430)	4.7%
Less Capital Reserve Funding	(1,993,235)	(2,637,125)	(1,995,539)	(2,658,152)	(662,613)	33.2%
Less Debt Service Principal	(9,511,991)	(10,081,136)	(12,119,811)	(12,043,993)	75,818	-0.6%
Net Change Before Other Adjustments & Transfers	(18,521,045)	(14,893,104)	(11,703,258)	(2,389,832)	9,313,426	
Transfer from/(to) Strategic Reserve	(1,647,974)	-	340,000	-	(340,000)	
Transfer from/(to) Budget Stabilization	5,054,425	(123,858)	714,628	-	(714,628)	
Net Change Subtotal	(15,114,594)	(15,016,962)	(10,648,630)	(2,389,832)	8,258,798	
Other Strategic Transfers from/(to) Reserves	1,578,479	(7,300,992)	10,582,389	5,310,960	(5,271,429)	
Net Change in Cash & Reserve Transfers	\$ (13,536,115)	\$ (22,317,955)	\$ (66,241)	\$ 2,921,128	\$ 2,987,369	

Board of Trustees Meeting - Budget Committee Vote

SYSTEM TOTAL						
FY25 PROPOSED BUDGET						
	E&G		Proposed			
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE	
Revenues						
Tuition & Fee Revenue	\$ 327,578,994	\$ 313,421,814	\$ 322,990,724	\$ 334,184,554	\$ 11,193,830	3.5%
Dining Revenue	(225)	-	-	-	-	-%
Residence Revenue	26,668	36,064	-	-	-	-%
Tuition Waivers/Scholarships	(97,987,130)	(93,937,630)	(90,278,842)	(89,050,994)	1,227,848	-1.4%
Net Student Charges Revenue	229,618,306	219,520,249	232,711,882	245,133,560	12,421,678	5.3%
State Appropriation	205,554,730	220,005,476	229,563,631	239,938,728	10,375,097	4.5%
HEERF Relief - Lost Revenue	5,040,979	713,226	-	-	-	-%
Indirect Cost Recovery	23,517,394	24,923,064	25,858,985	27,009,985	1,151,000	4.5%
Investment Income/Gifts	(12,697,487)	11,017,978	4,047,173	4,435,894	388,721	9.6%
Sales/Services/Auxiliary	17,572,332	19,992,719	20,247,160	23,033,536	2,786,376	13.8%
Total Revenue	468,606,254	496,172,712	512,428,831	539,551,703	27,122,872	5.3%
Expenses						
Salaries, Wages & Benefits	\$374,604,008	\$382,621,268	\$399,519,092	\$400,762,670	\$1,243,578	0.3%
Attrition (Salary Only)	-	-	(9,898,586)	(7,184,267)	2,714,319	-27.4%
Personnel	374,604,008	382,621,268	389,620,506	393,578,403	3,957,897	1.0%
Other Expenses & Transfers:						
Fuel & Electricity	12,776,897	11,812,652	18,990,737	17,846,972	(1,143,765)	-6.0%
Supplies & Services	39,268,697	44,799,814	40,007,257	45,825,745	5,818,488	14.5%
Shared Services	(42,015)	(67,342)	(627,515)	(95,457)	532,058	-84.8%
Travel	5,444,629	7,883,235	7,220,596	8,213,526	992,930	13.8%
Memberships, Contributions & Sponsorships	1,145,619	1,090,195	1,136,690	1,084,627	(52,064)	-4.6%
Maintenance & Alterations	12,362,690	11,709,533	12,082,292	12,578,427	496,135	4.1%
Interest	1,239,691	1,844,962	2,079,683	2,005,604	(74,079)	-3.6%
Depreciation	32,113,885	34,116,733	37,431,225	40,368,162	2,936,937	7.8%
Other Expenses	6,891,036	6,907,001	10,469,686	11,491,769	1,022,084	9.8%
Unassigned Budget	13,130	7,261	584,458	1,106,468	522,010	89.3%
Transfers to/(from) MAFES/CES	13,501,367	12,261,900	12,080,893	11,514,724	(566,169)	-4.7%
Transfers to/(from) MEIF	7,276,249	5,975,913	5,650,262	5,314,415	(335,847)	-5.9%
Transfers - Other	(918,297)	1,759,702	503,576	6,010,732	5,507,156	1093.6%
Pooled Costs - Benefits	(1,130,536)	(7,176,601)	-	-	-	-%
Pooled Costs - Insurance	221,985	(382,714)	-	-	-	-%
Total Other Expenses & Transfers	130,165,029	132,542,244	147,609,840	163,265,714	15,655,873	10.6%
Total Operating Expenses & Transfers	504,769,038	515,163,512	537,230,346	556,844,117	19,613,770	3.7%
Operating Increase (Decrease)	\$ (36,162,784)	\$ (18,990,800)	\$ (24,801,515)	\$ (17,292,414)	\$ 7,509,101	-30.3%
Modified Cash Flow						
Operating Increase (Decrease)	\$ (36,162,784)	\$ (18,990,800)	\$ (24,801,515)	\$ (17,292,414)	\$ 7,509,101	-30.3%
Add Back Depreciation	32,113,885	34,116,733	37,431,225	40,368,162	2,936,937	7.8%
Less Capital Expenditures	(10,498,766)	(15,104,123)	(14,198,426)	(15,153,905)	(955,479)	6.7%
Less Capital Reserve Funding	(1,313,141)	(2,637,125)	(1,991,557)	(2,628,203)	(636,646)	32.0%
Less Debt Service Principal	(4,261,884)	(5,495,941)	(6,565,495)	(6,800,901)	(235,406)	3.6%
Net Change Before Other Adjustments & Transfers	(20,122,690)	(8,111,256)	(10,125,768)	(1,507,260)	8,618,508	
Transfer from/(to) Strategic Reserve	(1,647,974)	-	340,000	-	(340,000)	
Transfer from/(to) Budget Stabilization	4,828,321	(1,694,896)	500,000	-	(500,000)	
Net Change Subtotal	(16,942,343)	(9,806,152)	(9,285,768)	(1,507,260)	7,778,508	
Other Strategic Transfers from/(to) Reserves	993,679	(7,297,435)	9,186,771	5,310,960	(3,875,811)	
Net Change in Cash & Reserve Transfers	\$ (15,948,664)	\$ (17,103,587)	\$ (98,997)	\$ 3,803,700	\$ 3,902,697	

SYSTEM TOTAL						
FY25 PROPOSED BUDGET						
	Auxiliary		Proposed		BUDGET CHANGE	
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE		
Revenues						
Tuition & Fee Revenue	\$ (1,499)	\$ (138)	\$ 1,000,000	\$ 1,050,000	\$ 50,000	5.0%
Dining Revenue	30,109,667	31,783,630	30,055,831	32,483,885	2,428,054	8.1%
Residence Revenue	35,024,145	35,457,839	44,172,202	46,670,094	2,497,892	5.7%
Tuition Waivers/Scholarships	(2,815,809)	(2,672,025)	(2,744,739)	(2,937,004)	(192,265)	7.0%
Net Student Charges Revenue	62,316,504	64,569,306	72,483,294	77,266,975	4,783,681	6.6%
State Appropriation	-	-	-	-	-	-%
HEERF Relief - Lost Revenue	8,783,411	351,863	-	-	-	-%
Indirect Cost Recovery	-	-	-	-	-	-%
Investment Income/Gifts	-	-	-	-	-	-%
Sales/Services/Auxiliary	10,835,436	10,555,778	10,788,740	12,752,133	1,963,393	18.2%
Total Revenue	81,935,352	75,476,947	83,272,034	90,019,108	6,747,074	8.1%
Expenses						
Salaries, Wages & Benefits	\$23,375,704	\$24,153,850	\$15,965,826	\$15,834,880	(\$130,946)	-0.8%
Attrition (Salary Only)	-	-	(86,282)	-	86,282	-100.0%
Personnel	23,375,704	24,153,850	15,879,544	15,834,880	(44,664)	-0.3%
Other Expenses & Transfers:						
Fuel & Electricity	6,241,140	5,028,878	6,760,984	8,388,914	1,627,930	24.1%
Supplies & Services	22,072,921	25,673,728	31,088,718	35,460,808	4,372,090	14.1%
Shared Services	42,109	67,854	67,854	74,550	6,696	9.9%
Travel	111,178	42,367	5,325	61,559	56,234	1056.0%
Memberships, Contributions & Sponsorships	15,835	10,020	9,381	12,244	2,863	30.5%
Maintenance & Alterations	3,812,368	4,192,749	4,238,631	4,188,361	(50,270)	-1.2%
Interest	2,967,308	2,107,895	6,596,380	6,443,537	(152,843)	-2.3%
Depreciation	6,522,411	6,640,555	6,863,456	8,680,706	1,817,250	26.5%
Other Expenses	8,751,203	8,953,832	6,815,070	7,421,406	606,336	8.9%
Unassigned Budget	-	-	118,197	118,197	-	0.0%
Transfers - Other	4,141,551	4,780,515	5,005,406	5,078,495	73,089	1.5%
Total Other Expenses & Transfers	54,678,023	57,498,393	67,569,402	75,928,778	8,359,376	12.4%
Total Operating Expenses & Transfers	78,053,728	81,652,242	83,448,946	91,763,658	8,314,712	10.0%
Operating Increase (Decrease)	\$ 3,881,624	\$ (6,175,295)	\$ (176,912)	\$ (1,744,550)	\$ (1,567,638)	886.1%
Modified Cash Flow						
Operating Increase (Decrease)	\$ 3,881,624	\$ (6,175,295)	\$ (176,912)	\$ (1,744,550)	\$ (1,567,638)	886.1%
Add Back Depreciation	6,522,411	6,640,555	6,863,456	8,680,706	1,817,250	26.5%
Less Capital Expenditures	(2,872,189)	(2,661,912)	(2,705,736)	(2,545,687)	160,049	-5.9%
Less Capital Reserve Funding	(680,094)	-	(3,982)	(29,949)	(25,967)	652.1%
Less Debt Service Principal	(5,250,107)	(4,585,195)	(5,554,316)	(5,243,092)	311,224	-5.6%
Net Change Before Other Adjustments & Transfers	1,601,645	(6,781,848)	(1,577,490)	(882,572)	694,918	
Transfer from/(to) Strategic Reserve	-	-	-	-	-	
Transfer from/(to) Budget Stabilization	226,104	1,571,038	214,628	-	(214,628)	
Net Change Subtotal	1,827,749	(5,210,810)	(1,362,862)	(882,572)	480,290	
Other Strategic Transfers from/(to) Reserves	584,801	(3,558)	1,395,618	-	(1,395,618)	
Net Change in Cash & Reserve Transfers	\$ 2,412,549	\$ (5,214,367)	\$ 32,756	\$ (882,572)	\$ (915,328)	

University of Maine FY25 PROPOSED BUDGET						
	E&G and Auxiliary		Proposed		BUDGET CHANGE	
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE		
Revenues						
Tuition & Fee Revenue	\$ 195,359,309	\$ 184,267,119	\$ 186,485,532	\$ 185,235,498	\$ (1,250,034)	-0.7%
Dining Revenue	20,366,487	21,226,416	18,750,346	20,514,502	1,764,156	9.4%
Residence Revenue	21,719,604	21,646,323	21,974,108	23,906,100	1,931,992	8.8%
Tuition Waivers/Scholarships	(70,144,718)	(68,248,719)	(64,439,481)	(61,839,472)	2,600,009	-4.0%
Net Student Charges Revenue	167,300,681	158,891,138	162,770,505	167,816,628	5,046,123	3.1%
State Appropriation	90,449,439	95,967,855	100,544,640	105,130,162	4,585,522	4.6%
HEERF Relief - Lost Revenue	273	(273)	-	-	-	-%
Indirect Cost Recovery	18,532,602	19,945,384	20,993,600	22,153,600	1,160,000	5.5%
Investment Income/Gifts	1,054,009	1,077,564	1,107,708	1,144,016	36,308	3.3%
Sales/Services/Auxiliary	21,668,824	23,008,447	21,904,259	26,309,722	4,405,463	20.1%
Total Revenue	299,005,829	298,890,116	307,320,712	322,554,128	15,233,416	5.0%
Expenses						
Salaries, Wages & Benefits	\$180,362,791	\$192,206,935	\$186,975,181	\$188,085,749	\$1,110,568	0.6%
Attrition (Salary Only)	-	-	(3,115,036)	(1,152,204)	1,962,832	-63.0%
Personnel	180,362,791	192,206,935	183,860,145	186,933,545	3,073,400	1.7%
Other Expenses & Transfers:						
Fuel & Electricity	12,372,244	10,575,524	16,860,184	16,665,470	(194,714)	-1.2%
Supplies & Services	31,786,954	36,251,803	39,216,699	46,705,047	7,488,348	19.1%
Shared Services	21,934,346	22,575,248	23,637,389	23,939,361	301,972	1.3%
Travel	3,326,243	5,077,520	4,720,303	5,111,015	390,712	8.3%
Memberships, Contributions & Sponsorships	499,357	438,269	443,480	425,013	(18,467)	-4.2%
Maintenance & Alterations	8,302,201	9,387,681	8,517,617	8,988,675	471,058	5.5%
Interest	2,079,449	2,033,953	1,901,359	1,712,032	(189,327)	-10.0%
Depreciation	20,328,742	21,404,976	22,173,571	22,840,373	666,802	3.0%
Other Expenses	5,188,325	3,226,011	3,650,714	2,145,436	(1,505,278)	-41.2%
Unassigned Budget	96	-	469,942	-	(469,942)	-100.0%
Transfers to/(from) MAFES/CES	13,501,367	12,261,900	12,080,893	11,514,724	(566,169)	-4.7%
Transfers to/(from) MEIF	7,276,249	5,975,913	5,650,262	5,314,415	(335,847)	-5.9%
Transfers - Other	4,849,164	2,977,281	892,823	4,547,159	3,654,336	409.3%
Total Other Expenses & Transfers	131,444,737	132,186,079	140,215,236	149,908,720	9,693,484	6.9%
Total Operating Expenses & Transfers	311,807,528	324,393,014	324,075,381	336,842,265	12,766,884	3.9%
Operating Increase (Decrease)	\$ (12,801,699)	\$ (25,502,898)	\$ (16,754,669)	\$ (14,288,137)	\$ 2,466,532	-14.7%
Modified Cash Flow						
Operating Increase (Decrease)	\$ (12,801,699)	\$ (25,502,898)	\$ (16,754,669)	\$ (14,288,137)	\$ 2,466,532	-14.7%
Add Back Depreciation	20,328,742	21,404,976	22,173,571	22,840,373	666,802	3.0%
Less Capital Expenditures	(7,554,000)	(8,108,387)	(8,405,445)	(8,732,988)	(327,543)	3.9%
Less Capital Reserve Funding	(869,604)	-	-	-	-	-%
Less Debt Service Principal	(4,477,944)	(5,130,873)	(5,127,929)	(4,536,042)	591,887	-11.5%
Net Change Before Other Adjustments & Transfers	(5,374,504)	(17,337,183)	(8,114,472)	(4,716,794)	3,397,678	
Transfer from/(to) Strategic Reserve	-	-	-	-	-	
Transfer from/(to) Budget Stabilization	-	-	-	-	-	
Net Change Subtotal	(5,374,504)	(17,337,183)	(8,114,472)	(4,716,794)	3,397,678	
Other Strategic Transfers from/(to) Reserves	122,553	(27,496)	8,114,472	4,810,455	(3,304,017)	
Net Change in Cash & Reserve Transfers	\$ (5,251,951)	\$ (17,364,679)	\$ -	\$ 93,661	\$ 93,661	

University of Maine
FY25 PROPOSED BUDGET

	E&G			Proposed		
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE	
Revenues						
Tuition & Fee Revenue	\$ 195,359,309	\$ 184,267,119	\$ 186,485,532	\$ 185,235,498	\$ (1,250,034)	-0.7%
Tuition Waivers/Scholarships	(68,720,947)	(67,024,739)	(63,198,334)	(60,520,292)	2,678,042	-4.2%
Net Student Charges Revenue	126,638,362	117,242,380	123,287,198	124,715,206	1,428,008	1.2%
State Appropriation	90,449,439	95,967,855	100,544,640	105,130,162	4,585,522	4.6%
HEERF Relief - Lost Revenue	-	-	-	-	-	-%
Indirect Cost Recovery	18,532,602	19,945,384	20,993,600	22,153,600	1,160,000	5.5%
Investment Income/Gifts	1,054,009	1,077,564	1,107,708	1,144,016	36,308	3.3%
Sales/Services/Auxiliary	12,365,054	13,724,347	12,726,247	15,148,267	2,422,020	19.0%
Total Revenue	249,039,466	247,957,530	258,659,393	268,291,251	9,631,858	3.7%
Expenses						
Salaries, Wages & Benefits	\$162,439,858	\$173,666,996	\$177,232,173	\$178,308,763	\$1,076,590	0.6%
Attrition (Salary Only)	-	-	(3,115,036)	(1,152,204)	1,962,832	-63.0%
Personnel	162,439,858	173,666,996	174,117,137	177,156,559	3,039,422	1.7%
Other Expenses & Transfers:						
Fuel & Electricity	8,178,022	7,437,500	12,897,820	11,245,441	(1,652,379)	-12.8%
Supplies & Services	19,290,235	21,054,928	19,122,891	22,829,542	3,706,651	19.4%
Shared Services	21,892,237	22,507,394	23,569,535	23,864,811	295,276	1.3%
Travel	3,231,154	5,046,683	4,674,953	5,069,165	394,212	8.4%
Memberships, Contributions & Sponsorships	486,398	431,076	435,880	417,413	(18,467)	-4.2%
Maintenance & Alterations	5,420,576	6,391,054	5,668,560	6,233,147	564,587	10.0%
Interest	488,957	1,191,598	1,148,769	1,121,319	(27,450)	-2.4%
Depreciation	16,203,866	17,194,170	18,113,073	18,721,129	608,056	3.4%
Other Expenses	1,413,875	(153,948)	500,266	(1,394,277)	(1,894,543)	-378.7%
Unassigned Budget	96	-	469,942	-	(469,942)	-100.0%
Transfers to/(from) MAFES/CES	13,501,367	12,261,900	12,080,893	11,514,724	(566,169)	-4.7%
Transfers to/(from) MEIF	7,276,249	5,975,913	5,650,262	5,314,415	(335,847)	-5.9%
Transfers - Other	4,699,662	(2,242,649)	(3,686,671)	(9,076)	3,677,595	-99.8%
Total Other Expenses & Transfers	102,082,695	97,095,618	100,646,173	104,927,752	4,281,579	4.3%
Total Operating Expenses & Transfers	264,522,553	270,762,614	274,763,310	282,084,311	7,321,001	2.7%
Operating Increase (Decrease)	\$ (15,483,087)	\$ (22,805,084)	\$ (16,103,917)	\$ (13,793,060)	\$ 2,310,857	-14.3%
Modified Cash Flow						
Operating Increase (Decrease)	\$ (15,483,087)	\$ (22,805,084)	\$ (16,103,917)	\$ (13,793,060)	\$ 2,310,857	-14.3%
Add Back Depreciation	16,203,866	17,194,170	18,113,073	18,721,129	608,056	3.4%
Less Capital Expenditures	(5,686,898)	(6,277,770)	(6,623,004)	(6,978,188)	(355,184)	5.4%
Less Capital Reserve Funding	(300,318)	-	-	-	-	-%
Less Debt Service Principal	(1,622,965)	(3,056,737)	(3,002,778)	(2,760,336)	242,442	-8.1%
Net Change Before Other Adjustments & Transfers	(6,889,402)	(14,945,420)	(7,616,626)	(4,810,455)	2,806,171	
Transfer from/(to) Strategic Reserve	-	-	-	-	-	
Transfer from/(to) Budget Stabilization	-	-	-	-	-	
Net Change Subtotal	(6,889,402)	(14,945,420)	(7,616,626)	(4,810,455)	2,806,171	
Other Strategic Transfers from/(to) Reserves	129,808	(23,939)	7,616,626	4,810,455	(2,806,171)	
Net Change in Cash & Reserve Transfers	\$ (6,759,594)	\$ (14,969,359)	\$ -	\$ (0)	\$ (0)	

University of Maine
FY25 PROPOSED BUDGET

	Auxiliary		Proposed		BUDGET CHANGE	
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE		
<u>Revenues</u>						
Tuition & Fee Revenue	\$ -	\$ -	\$ -	\$ -	\$ -	-%
Dining Revenue	20,366,487	21,226,416	18,750,346	20,514,502	1,764,156	9.4%
Residence Revenue	21,719,604	21,646,323	21,974,108	23,906,100	1,931,992	8.8%
Tuition Waivers/Scholarships	(1,423,771)	(1,223,980)	(1,241,147)	(1,319,180)	(78,033)	6.3%
Net Student Charges Revenue	40,662,320	41,648,758	39,483,307	43,101,422	3,618,115	9.2%
State Appropriation	-	-	-	-	-	-%
HEERF Relief - Lost Revenue	273	(273)	-	-	-	-%
Indirect Cost Recovery	-	-	-	-	-	-%
Investment Income/Gifts	-	-	-	-	-	-%
Sales/Services/Auxiliary	9,303,770	9,284,100	9,178,012	11,161,455	1,983,443	21.6%
Total Revenue	49,966,363	50,932,585	48,661,319	54,262,877	5,601,558	11.5%
<u>Expenses</u>						
Salaries, Wages & Benefits	\$17,922,933	\$18,539,938	\$9,743,008	\$9,776,986	\$33,978	0.3%
Attrition (Salary Only)	-	-	-	-	-	-%
Personnel	17,922,933	18,539,938	9,743,008	9,776,986	33,978	0.3%
Other Expenses & Transfers:						
Fuel & Electricity	4,194,222	3,138,024	3,962,364	5,420,029	1,457,665	36.8%
Supplies & Services	12,496,719	15,196,875	20,093,808	23,875,505	3,781,697	18.8%
Shared Services	42,109	67,854	67,854	74,550	6,696	9.9%
Travel	95,088	30,837	45,350	41,850	(3,500)	-7.7%
Memberships, Contributions & Sponsorships	12,959	7,194	7,600	7,600	-	0.0%
Maintenance & Alterations	2,881,625	2,996,627	2,849,057	2,755,528	(93,529)	-3.3%
Interest	1,590,492	842,356	752,590	590,713	(161,877)	-21.5%
Depreciation	4,124,876	4,210,805	4,060,498	4,119,244	58,746	1.4%
Other Expenses	3,774,450	3,379,959	3,150,448	3,539,713	389,265	12.4%
Unassigned Budget	-	-	-	-	-	-%
Transfers to/(from) MAFES/CES	-	-	-	-	-	-%
Transfers to/(from) MEIF	-	-	-	-	-	-%
Transfers - Other	149,502	5,219,930	4,579,494	4,556,235	(23,259)	-0.5%
Total Other Expenses & Transfers	29,362,042	35,090,462	39,569,063	44,980,968	5,411,905	13.7%
Total Operating Expenses & Transfers	47,284,975	53,630,400	49,312,071	54,757,954	5,445,883	11.0%
Operating Increase (Decrease)	\$ 2,681,388	\$ (2,697,815)	\$ (650,752)	\$ (495,077)	\$ 155,675	-23.9%
<u>Modified Cash Flow</u>						
Operating Increase (Decrease)	\$ 2,681,388	\$ (2,697,815)	\$ (650,752)	\$ (495,077)	\$ 155,675	-23.9%
Add Back Depreciation	4,124,876	4,210,805	4,060,498	4,119,244	58,746	1.4%
Less Capital Expenditures	(1,867,101)	(1,830,618)	(1,782,441)	(1,754,800)	27,641	-1.6%
Less Capital Reserve Funding	(569,286)	-	-	-	-	-%
Less Debt Service Principal	(2,854,979)	(2,074,136)	(2,125,151)	(1,775,706)	349,445	-16.4%
Net Change Before Other Adjustments & Transfers	1,514,898	(2,391,763)	(497,846)	93,661	591,507	
Transfer from/(to) Strategic Reserve	-	-	-	-	-	
Transfer from/(to) Budget Stabilization	-	-	-	-	-	
Net Change Subtotal	1,514,898	(2,391,763)	(497,846)	93,661	591,507	
Other Strategic Transfers from/(to) Reserves	(7,255)	(3,558)	497,846	-	(497,846)	
Net Change in Cash & Reserve Transfers	\$ 1,507,643	\$ (2,395,320)	\$ -	\$ 93,661	\$ 93,661	

University of Maine at Augusta							
FY25 PROPOSED BUDGET							
	E&G and Auxiliary			Proposed			
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE		
Revenues							
Tuition & Fee Revenue	\$ 22,433,422	\$ 21,514,274	\$ 21,915,564	\$ 24,003,640	\$ 2,088,076	9.5%	
Dining Revenue	12,428	26,826	31,200	190,000	158,800	509.0%	
Residence Revenue	537,979	554,879	676,404	732,208	55,804	8.3%	
Tuition Waivers/Scholarships	(3,224,340)	(3,078,174)	(2,505,725)	(2,608,408)	(102,683)	4.1%	
Net Student Charges Revenue	19,759,489	19,017,805	20,117,443	22,317,440	2,199,997	10.9%	
State Appropriation	19,466,151	21,193,991	22,945,305	23,921,100	975,795	4.3%	
HEERF Relief - Lost Revenue	-	-	-	-	-	-%	
Indirect Cost Recovery	154,265	112,524	160,885	160,885	-	0.0%	
Investment Income/Gifts	-	-	-	-	-	-%	
Sales/Services/Auxiliary	381,233	447,033	697,659	732,851	35,192	5.0%	
Total Revenue	39,761,138	40,771,353	43,921,292	47,132,276	3,210,984	7.3%	
Expenses							
Salaries, Wages & Benefits	\$29,281,239	\$28,604,705	\$31,111,518	\$32,128,162	\$1,016,644	3.3%	
Attrition (Salary Only)	-	-	(1,442,818)	(1,442,818)	-	0.0%	
Personnel	29,281,239	28,604,705	29,668,700	30,685,344	1,016,644	3.4%	
Other Expenses & Transfers:							
Fuel & Electricity	853,187	759,950	835,006	898,475	63,469	7.6%	
Supplies & Services	1,554,905	1,928,952	1,799,374	1,985,649	186,275	10.4%	
Shared Services	4,858,709	5,030,097	5,081,487	4,996,083	(85,404)	-1.7%	
Travel	179,623	217,972	230,760	266,252	35,492	15.4%	
Memberships, Contributions & Sponsorships	54,692	60,551	66,018	67,085	1,067	1.6%	
Maintenance & Alterations	761,627	550,663	969,099	974,396	5,297	0.5%	
Interest	13,190	3,152	45,054	52,357	7,303	16.2%	
Depreciation	1,917,549	2,166,430	2,335,870	2,448,329	112,459	4.8%	
Other Expenses	2,001,686	3,210,432	3,508,495	4,118,200	609,705	17.4%	
Unassigned Budget	13,034	7,261	9,000	74,361	65,361	726.2%	
Transfers - Other	(1,175,195)	(289,632)	108,892	135,647	26,755	24.6%	
Total Other Expenses & Transfers	11,033,008	13,645,828	14,989,055	16,016,834	1,027,779	6.9%	
Total Operating Expenses & Transfers	40,314,246	42,250,532	44,657,755	46,702,178	2,044,423	4.6%	
Operating Increase (Decrease)	\$ (553,109)	\$ (1,479,179)	\$ (736,463)	\$ 430,098	\$ 1,166,561	-158.4%	
Modified Cash Flow							
Operating Increase (Decrease)	\$ (553,109)	\$ (1,479,179)	\$ (736,463)	\$ 430,098	\$ 1,166,561	-158.4%	
Add Back Depreciation	1,917,549	2,166,430	2,335,870	2,448,329	112,459	4.8%	
Less Capital Expenditures	(679,037)	(1,342,388)	(1,305,955)	(1,372,284)	(66,329)	5.1%	
Less Capital Reserve Funding	-	-	-	-	-	-%	
Less Debt Service Principal	(273,029)	(64,680)	(293,452)	(377,857)	(84,405)	28.8%	
Net Change Before Other Adjustments & Transfers	412,375	(719,817)	-	1,128,286	1,128,286		
Transfer from/(to) Strategic Reserve	-	-	-	-	-		
Transfer from/(to) Budget Stabilization	-	-	-	-	-		
Net Change Subtotal	412,375	(719,817)	-	1,128,286	1,128,286		
Other Strategic Transfers from/(to) Reserves	(1,106)	-	-	-	-		
Net Change in Cash & Reserve Transfers	\$ 411,269	\$ (719,817)	\$ -	\$ 1,128,286	\$ 1,128,286		

University of Maine at Augusta

FY25 PROPOSED BUDGET

	E&G		Proposed			
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE	
Revenues						
Tuition & Fee Revenue	\$ 22,433,422	\$ 21,514,274	\$ 21,915,564	\$ 24,003,640	\$ 2,088,076	9.5%
Tuition Waivers/Scholarships	(3,183,340)	(3,035,984)	(2,433,989)	(2,533,489)	(99,500)	4.1%
Net Student Charges Revenue	19,250,082	18,478,290	19,481,575	21,470,151	1,988,576	10.2%
State Appropriation	19,466,151	21,193,991	22,945,305	23,921,100	975,795	4.3%
HEERF Relief - Lost Revenue	-	-	-	-	-	-%
Indirect Cost Recovery	154,265	112,524	160,885	160,885	-	0.0%
Investment Income/Gifts	-	-	-	-	-	-%
Sales/Services/Auxiliary	256,444	394,293	622,459	681,651	59,192	9.5%
Total Revenue	39,126,942	40,179,098	43,210,224	46,233,787	3,023,563	7.0%
Expenses						
Salaries, Wages & Benefits	\$29,116,413	\$28,478,130	\$30,989,072	\$31,986,664	\$997,592	3.2%
Attrition (Salary Only)	-	-	(1,442,818)	(1,442,818)	-	0.0%
Personnel	29,116,413	28,478,130	29,546,254	30,543,846	997,592	3.4%
Other Expenses & Transfers:						
Fuel & Electricity	851,440	758,236	833,006	896,475	63,469	7.6%
Supplies & Services	1,548,431	1,777,407	1,740,436	1,826,711	86,275	5.0%
Shared Services	4,858,709	5,030,097	5,081,487	4,996,083	(85,404)	-1.7%
Travel	177,298	217,572	230,760	266,252	35,492	15.4%
Memberships, Contributions & Sponsorships	54,692	60,551	66,018	67,085	1,067	1.6%
Maintenance & Alterations	747,492	545,971	958,099	959,396	1,297	0.1%
Interest	12,809	2,890	44,914	52,333	7,419	16.5%
Depreciation	1,904,481	2,154,496	2,325,178	2,438,149	112,971	4.9%
Other Expenses	1,281,849	2,348,191	2,706,542	3,149,127	442,585	16.4%
Unassigned Budget	13,034	7,261	9,000	74,361	65,361	726.2%
Transfers - Other	(1,175,195)	(289,853)	108,892	135,647	26,755	24.6%
Total Other Expenses & Transfers	10,275,040	12,612,819	14,104,332	14,861,619	757,287	5.4%
Total Operating Expenses & Transfers	39,391,453	41,090,949	43,650,586	45,405,465	1,754,879	4.0%
Operating Increase (Decrease)	\$ (264,511)	\$ (911,851)	\$ (440,362)	\$ 828,322	\$ 1,268,684	-288.1%
Modified Cash Flow						
Operating Increase (Decrease)	\$ (264,511)	\$ (911,851)	\$ (440,362)	\$ 828,322	\$ 1,268,684	-288.1%
Add Back Depreciation	1,904,481	2,154,496	2,325,178	2,438,149	112,971	4.9%
Less Capital Expenditures	(676,120)	(1,339,471)	(1,305,955)	(1,370,784)	(64,829)	5.0%
Less Capital Reserve Funding	-	-	-	-	-	-%
Less Debt Service Principal	(267,271)	(58,802)	(287,453)	(374,811)	(87,358)	30.4%
Net Change Before Other Adjustments & Transfers	696,578	(155,628)	291,408	1,520,876	1,229,468	
Transfer from/(to) Strategic Reserve	-	-	-	-	-	
Transfer from/(to) Budget Stabilization	-	-	-	-	-	
Net Change Subtotal	696,578	(155,628)	291,408	1,520,876	1,229,468	
Other Strategic Transfers from/(to) Reserves	(1,106)	-	-	-	-	
Net Change in Cash & Reserve Transfers	\$ 695,472	\$ (155,628)	\$ 291,408	\$ 1,520,876	\$ 1,229,468	

University of Maine at Augusta
FY25 PROPOSED BUDGET

	Auxiliary			Proposed		
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE	
Revenues						
Tuition & Fee Revenue	\$ -	\$ -	\$ -	\$ -	\$ -	-%
Dining Revenue	12,428	26,826	31,200	190,000	158,800	509.0%
Residence Revenue	537,979	554,879	676,404	732,208	55,804	8.3%
Tuition Waivers/Scholarships	(41,000)	(42,190)	(71,736)	(74,919)	(3,183)	4.4%
Net Student Charges Revenue	509,407	539,515	635,868	847,289	211,421	33.2%
State Appropriation	-	-	-	-	-	-%
HEERF Relief - Lost Revenue	-	-	-	-	-	-%
Indirect Cost Recovery	-	-	-	-	-	-%
Investment Income/Gifts	-	-	-	-	-	-%
Sales/Services/Auxiliary	124,789	52,740	75,200	51,200	(24,000)	-31.9%
Total Revenue	634,196	592,255	711,068	898,489	187,421	26.4%
Expenses						
Salaries, Wages & Benefits	\$164,825	\$126,575	\$122,446	\$141,498	\$19,052	15.6%
Attrition (Salary Only)	-	-	-	-	-	-%
Personnel	164,825	126,575	122,446	141,498	19,052	15.6%
Other Expenses & Transfers:						
Fuel & Electricity	1,747	1,714	2,000	2,000	-	0.0%
Supplies & Services	6,473	151,545	58,938	158,938	100,000	169.7%
Shared Services	-	-	-	-	-	-%
Travel	2,325	399	-	-	-	-%
Memberships, Contributions & Sponsorships	-	-	-	-	-	-%
Maintenance & Alterations	14,135	4,692	11,000	15,000	4,000	36.4%
Interest	381	262	140	24	(116)	-83.2%
Depreciation	13,069	11,934	10,692	10,180	(512)	-4.8%
Other Expenses	719,837	862,241	801,953	969,073	167,120	20.8%
Unassigned Budget	-	-	-	-	-	-%
Transfers - Other	-	221	-	-	-	-%
Total Other Expenses & Transfers	757,968	1,033,008	884,723	1,155,215	270,492	30.6%
Total Operating Expenses & Transfers	922,793	1,159,584	1,007,169	1,296,713	289,544	28.7%
Operating Increase (Decrease)	\$ (288,597)	\$ (567,329)	\$ (296,101)	\$ (398,224)	\$ (102,123)	34.5%
Modified Cash Flow						
Operating Increase (Decrease)	\$ (288,597)	\$ (567,329)	\$ (296,101)	\$ (398,224)	\$ (102,123)	34.5%
Add Back Depreciation	13,069	11,934	10,692	10,180	(512)	-4.8%
Less Capital Expenditures	(2,917)	(2,917)	-	(1,500)	(1,500)	-%
Less Capital Reserve Funding	-	-	-	-	-	-%
Less Debt Service Principal	(5,758)	(5,878)	(5,999)	(3,046)	2,953	-49.2%
Net Change Before Other Adjustments & Transfers	(284,204)	(564,189)	(291,408)	(392,590)	(101,182)	
Transfer from/(to) Strategic Reserve	-	-	-	-	-	
Transfer from/(to) Budget Stabilization	-	-	-	-	-	
Net Change Subtotal	(284,204)	(564,189)	(291,408)	(392,590)	(101,182)	
Other Strategic Transfers from/(to) Reserves	-	-	-	-	-	
Net Change in Cash & Reserve Transfers	\$ (284,204)	\$ (564,189)	\$ (291,408)	\$ (392,590)	\$ (101,182)	

Univ of Maine at Farmington							
FY25 PROPOSED BUDGET							
	E&G and Auxiliary			Proposed			
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE		
Revenues							
Tuition & Fee Revenue	\$ 17,418,391	\$ 15,923,394	\$ 16,115,952	\$ 16,313,603	\$ 197,651	1.2%	
Dining Revenue	3,393,989	3,360,965	3,282,661	3,631,696	349,035	10.6%	
Residence Revenue	4,135,431	4,142,030	4,178,057	4,792,604	614,547	14.7%	
Tuition Waivers/Scholarships	(5,106,520)	(4,331,677)	(3,832,029)	(4,029,456)	(197,427)	5.2%	
Net Student Charges Revenue	19,841,291	19,094,713	19,744,641	20,708,447	963,806	4.9%	
State Appropriation	13,950,935	14,521,745	14,664,284	14,810,927	146,643	1.0%	
HEERF Relief - Lost Revenue	2,040,397	119,391	-	-	-	-%	
Indirect Cost Recovery	411,137	294,204	275,000	275,000	-	0.0%	
Investment Income/Gifts	-	-	-	-	-	-%	
Sales/Services/Auxiliary	1,278,359	1,328,656	1,429,945	1,720,054	290,109	20.3%	
Total Revenue	37,522,118	35,358,708	36,113,870	37,514,428	1,400,558	3.9%	
Expenses							
Salaries, Wages & Benefits	\$27,990,094	\$25,615,543	\$23,850,985	\$23,412,276	(\$438,709)	-1.8%	
Attrition (Salary Only)	-	-	(679,047)	(900,000)	(220,953)	32.5%	
Personnel	27,990,094	25,615,543	23,171,938	22,512,276	(659,662)	-2.8%	
Other Expenses & Transfers:							
Fuel & Electricity	1,175,254	1,134,952	1,271,915	1,413,924	142,009	11.2%	
Supplies & Services	4,071,879	4,125,829	3,892,304	4,699,541	807,237	20.7%	
Shared Services	3,887,481	3,875,416	4,077,766	4,156,247	78,481	1.9%	
Travel	488,271	608,798	229,908	309,730	79,822	34.7%	
Memberships, Contributions & Sponsorships	90,703	94,600	50,344	72,503	22,159	44.0%	
Maintenance & Alterations	104,044	86,696	49,081	94,535	45,454	92.6%	
Interest	475,043	427,773	730,886	683,260	(47,626)	-6.5%	
Depreciation	2,606,945	2,602,645	2,759,732	3,626,469	866,737	31.4%	
Other Expenses	1,084,664	1,242,702	817,732	1,478,422	660,690	80.8%	
Unassigned Budget	-	-	-	-	-	-%	
Transfers - Other	(787,427)	(470,009)	(247,245)	(168,475)	78,770	-31.9%	
Total Other Expenses & Transfers	13,196,857	13,729,401	13,632,423	16,366,156	2,733,733	20.1%	
Total Operating Expenses & Transfers	41,186,951	39,344,944	36,804,361	38,878,432	2,074,071	5.6%	
Operating Increase (Decrease)	\$ (3,664,833)	\$ (3,986,236)	\$ (690,491)	\$ (1,364,004)	\$ (673,513)	97.5%	
Modified Cash Flow							
Operating Increase (Decrease)	\$ (3,664,833)	\$ (3,986,236)	\$ (690,491)	\$ (1,364,004)	\$ (673,513)	97.5%	
Add Back Depreciation	2,606,945	2,602,645	2,759,732	3,626,469	866,737	31.4%	
Less Capital Expenditures	(559,338)	(168,703)	(505,000)	(719,325)	(214,325)	42.4%	
Less Capital Reserve Funding	(467,461)	-	(3,982)	(104,949)	(100,967)	2535.6%	
Less Debt Service Principal	(1,060,543)	(1,116,989)	(1,560,259)	(1,438,191)	122,068	-7.8%	
Net Change Before Other Adjustments & Transfers	(3,145,230)	(2,669,284)	-	-	-		
Transfer from/(to) Strategic Reserve	-	-	-	-	-		
Transfer from/(to) Budget Stabilization	2,414,277	1,861,630	-	-	-		
Net Change Subtotal	(730,952)	(807,654)	-	-	-		
Other Strategic Transfers from/(to) Reserves	730,952	-	-	-	-		
Net Change in Cash & Reserve Transfers	\$ -	\$ (807,654)	\$ -	\$ -	\$ -		

Univ of Maine at Farmington FY25 PROPOSED BUDGET						
	E&G		Proposed			
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE	
Revenues						
Tuition & Fee Revenue	\$ 17,418,391	\$ 15,923,394	\$ 16,115,952	\$ 16,313,603	\$ 197,651	1.2%
Dining Revenue	(225)	-	-	-	-	-%
Tuition Waivers/Scholarships	(4,646,603)	(3,835,119)	(3,439,941)	(3,555,168)	(115,227)	3.3%
Net Student Charges Revenue	12,771,563	12,088,276	12,676,011	12,758,435	82,424	0.7%
State Appropriation	13,950,935	14,521,745	14,664,284	14,810,927	146,643	1.0%
HEERF Relief - Lost Revenue	-	-	-	-	-	-%
Indirect Cost Recovery	411,137	294,204	275,000	275,000	-	0.0%
Investment Income/Gifts	-	-	-	-	-	-%
Sales/Services/Auxiliary	793,026	954,849	1,172,945	1,469,054	296,109	25.2%
Total Revenue	27,926,660	27,859,073	28,788,240	29,313,416	525,176	1.8%
Expenses						
Salaries, Wages & Benefits	\$26,120,395	\$23,645,450	\$21,910,136	\$21,478,056	(\$432,080)	-2.0%
Attrition (Salary Only)	-	-	(592,765)	(900,000)	(307,235)	51.8%
Personnel	26,120,395	23,645,450	21,317,371	20,578,056	(739,315)	-3.5%
Other Expenses & Transfers:						
Fuel & Electricity	682,399	642,193	703,078	821,295	118,217	16.8%
Supplies & Services	1,108,319	1,063,667	637,203	1,212,191	574,988	90.2%
Shared Services	3,887,481	3,875,416	4,077,766	4,156,247	78,481	1.9%
Travel	479,753	610,434	288,830	309,168	20,338	7.0%
Memberships, Contributions & Sponsorships	89,357	94,450	50,344	69,675	19,331	38.4%
Maintenance & Alterations	63,028	49,413	49,081	46,951	(2,130)	-4.3%
Interest	148,650	132,490	388,229	362,983	(25,246)	-6.5%
Depreciation	1,929,855	1,941,544	2,065,878	2,858,326	792,448	38.4%
Other Expenses	(849,293)	(1,116,709)	782,687	1,169,192	386,505	49.4%
Unassigned Budget	-	-	-	-	-	-%
Transfers - Other	(787,427)	(470,009)	(241,120)	(168,475)	72,645	-30.1%
Total Other Expenses & Transfers	6,752,121	6,822,888	8,801,976	10,837,553	2,035,577	23.1%
Total Operating Expenses & Transfers	32,872,516	30,468,338	30,119,347	31,415,609	1,296,262	4.3%
Operating Increase (Decrease)	\$ (4,945,857)	\$ (2,609,265)	\$ (1,331,107)	\$ (2,102,193)	\$ (771,086)	57.9%
Modified Cash Flow						
Operating Increase (Decrease)	\$ (4,945,857)	\$ (2,609,265)	\$ (1,331,107)	\$ (2,102,193)	\$ (771,086)	57.9%
Add Back Depreciation	1,929,855	1,941,544	2,065,878	2,858,326	792,448	38.4%
Less Capital Expenditures	(247,260)	(14,674)	-	(354,325)	(354,325)	-%
Less Capital Reserve Funding	(356,653)	-	-	(75,000)	(75,000)	-%
Less Debt Service Principal	(356,720)	(380,617)	(734,771)	(667,950)	66,821	-9.1%
Net Change Before Other Adjustments & Transfers	(3,976,636)	(1,063,012)	-	(341,142)	(341,142)	
Transfer from/(to) Strategic Reserve	-	-	-	-	-	
Transfer from/(to) Budget Stabilization	2,414,277	1,057,166	-	-	-	
Net Change Subtotal	(1,562,358)	(5,846)	-	(341,142)	(341,142)	
Other Strategic Transfers from/(to) Reserves	730,952	-	-	-	-	
Net Change in Cash & Reserve Transfers	\$ (831,406)	\$ (5,846)	\$ -	\$ (341,142)	\$ (341,142)	

Univ of Maine at Farmington						
FY25 PROPOSED BUDGET						
	Auxiliary		Proposed			
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE	
Revenues						
Tuition & Fee Revenue	\$ -	\$ -	\$ -	\$ -	\$ -	-%
Dining Revenue	3,394,214	3,360,965	3,282,661	3,631,696	349,035	10.6%
Residence Revenue	4,135,431	4,142,030	4,178,057	4,792,604	614,547	14.7%
Tuition Waivers/Scholarships	(459,918)	(496,559)	(392,088)	(474,288)	(82,200)	21.0%
Net Student Charges Revenue	7,069,728	7,006,437	7,068,630	7,950,012	881,382	12.5%
State Appropriation	-	-	-	-	-	-%
HEERF Relief - Lost Revenue	2,040,397	119,391	-	-	-	-%
Indirect Cost Recovery	-	-	-	-	-	-%
Investment Income/Gifts	-	-	-	-	-	-%
Sales/Services/Auxiliary	485,333	373,807	257,000	251,000	(6,000)	-2.3%
Total Revenue	9,595,458	7,499,635	7,325,630	8,201,012	875,382	11.9%
Expenses						
Salaries, Wages & Benefits	\$1,869,699	\$1,970,093	\$1,940,849	\$1,934,220	(\$6,629)	-0.3%
Attrition (Salary Only)	-	-	(86,282)	-	86,282	-100.0%
Personnel	1,869,699	1,970,093	1,854,567	1,934,220	79,653	4.3%
Other Expenses & Transfers:						
Fuel & Electricity	492,855	492,759	568,837	592,629	23,792	4.2%
Supplies & Services	2,963,561	3,062,162	3,255,101	3,487,350	232,249	7.1%
Shared Services	-	-	-	-	-	-%
Travel	8,518	(1,636)	(58,922)	562	59,484	-101.0%
Memberships, Contributions & Sponsorships	1,347	150	-	2,828	2,828	-%
Maintenance & Alterations	41,016	37,283	-	47,584	47,584	-%
Interest	326,393	295,283	342,657	320,277	(22,380)	-6.5%
Depreciation	677,090	661,101	693,854	768,143	74,289	10.7%
Other Expenses	1,933,956	2,359,411	35,045	309,230	274,185	782.4%
Unassigned Budget	-	-	-	-	-	-%
Transfers - Other	-	-	(6,125)	-	6,125	-100.0%
Total Other Expenses & Transfers	6,444,736	6,906,513	4,830,447	5,528,603	698,156	14.5%
Total Operating Expenses & Transfers	8,314,434	8,876,606	6,685,014	7,462,823	777,809	11.6%
Operating Increase (Decrease)	\$ 1,281,024	\$ (1,376,971)	\$ 640,616	\$ 738,189	\$ 97,573	15.2%
Modified Cash Flow						
Operating Increase (Decrease)	\$ 1,281,024	\$ (1,376,971)	\$ 640,616	\$ 738,189	\$ 97,573	15.2%
Add Back Depreciation	677,090	661,101	693,854	768,143	74,289	10.7%
Less Capital Expenditures	(312,078)	(154,029)	(505,000)	(365,000)	140,000	-27.7%
Less Capital Reserve Funding	(110,808)	-	(3,982)	(29,949)	(25,967)	652.1%
Less Debt Service Principal	(703,823)	(736,372)	(825,488)	(770,241)	55,247	-6.7%
Net Change Before Other Adjustments & Transfers	831,406	(1,606,271)	-	341,142	341,142	
Transfer from/(to) Strategic Reserve	-	-	-	-	-	
Transfer from/(to) Budget Stabilization	-	804,464	-	-	-	
Net Change Subtotal	831,406	(801,807)	-	341,142	341,142	
Other Strategic Transfers from/(to) Reserves	-	-	-	-	-	
Net Change in Cash & Reserve Transfers	\$ 831,406	\$ (801,807)	\$ -	\$ 341,142	\$ 341,142	

Univ of Maine at Fort Kent							
FY25 PROPOSED BUDGET							
	E&G and Auxiliary			Proposed			
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE		
Revenues							
Tuition & Fee Revenue	\$ 6,709,721	\$ 5,723,620	\$ 6,126,110	\$ 6,935,463	\$ 809,353	13.2%	
Dining Revenue	534,142	411,908	480,967	535,780	54,813	11.4%	
Residence Revenue	655,507	556,776	619,748	638,962	19,214	3.1%	
Tuition Waivers/Scholarships	(1,209,714)	(1,005,703)	(1,018,484)	(1,027,091)	(8,607)	0.8%	
Net Student Charges Revenue	6,689,656	5,686,602	6,208,341	7,083,114	874,773	14.1%	
State Appropriation	8,590,375	8,737,138	8,823,901	8,912,140	88,239	1.0%	
HEERF Relief - Lost Revenue	1,225,790	853,884	-	-	-	-%	
Indirect Cost Recovery	46,782	33,949	33,500	24,500	(9,000)	-26.9%	
Investment Income/Gifts	-	-	-	-	-	-%	
Sales/Services/Auxiliary	389,029	160,797	281,959	369,295	87,336	31.0%	
Total Revenue	16,941,632	15,472,369	15,347,701	16,389,049	1,041,348	6.8%	
Expenses							
Salaries, Wages & Benefits	\$9,406,034	\$8,999,860	\$10,054,726	\$10,063,564	\$8,838	0.1%	
Attrition (Salary Only)	-	-	(150,000)	(312,193)	(162,193)	108.1%	
Personnel	9,406,034	8,999,860	9,904,726	9,751,371	(153,355)	-1.5%	
Other Expenses & Transfers:							
Fuel & Electricity	627,466	414,529	644,840	641,927	(2,913)	-0.5%	
Supplies & Services	2,257,884	2,292,264	1,962,076	1,721,975	(240,101)	-12.2%	
Shared Services	2,114,866	2,058,205	2,177,322	2,208,738	31,416	1.4%	
Travel	299,619	426,891	358,008	376,013	18,005	5.0%	
Memberships, Contributions & Sponsorships	49,038	39,933	48,545	46,730	(1,815)	-3.7%	
Maintenance & Alterations	173,237	203,659	194,550	213,150	18,600	9.6%	
Interest	194,239	175,747	142,128	141,589	(539)	-0.4%	
Depreciation	1,039,351	1,118,772	1,111,515	1,245,969	134,454	12.1%	
Other Expenses	372,265	432,839	472,157	428,486	(43,671)	-9.2%	
Unassigned Budget	-	-	23,244	13,050	(10,194)	-43.9%	
Transfers - Other	(127,342)	(238,006)	(189,749)	(181,720)	8,029	-4.2%	
Total Other Expenses & Transfers	7,000,623	6,924,831	6,944,636	6,855,907	(88,729)	-1.3%	
Total Operating Expenses & Transfers	16,406,657	15,924,691	16,849,362	16,607,278	(242,084)	-1.4%	
Operating Increase (Decrease)	\$ 534,975	\$ (452,322)	\$ (1,501,661)	\$ (218,229)	\$ 1,283,432	-85.5%	
Modified Cash Flow							
Operating Increase (Decrease)	\$ 534,975	\$ (452,322)	\$ (1,501,661)	\$ (218,229)	\$ 1,283,432	-85.5%	
Add Back Depreciation	1,039,351	1,118,772	1,111,515	1,245,969	134,454	12.1%	
Less Capital Expenditures	(392,879)	(304,686)	(455,434)	(489,000)	(33,566)	7.4%	
Less Capital Reserve Funding	-	-	-	-	-	-%	
Less Debt Service Principal	(629,609)	(564,040)	(611,420)	(538,740)	72,680	-11.9%	
Net Change Before Other Adjustments & Transfers	551,838	(202,276)	(1,457,000)	-	1,457,000		
Transfer from/(to) Strategic Reserve	-	-	-	-	-		
Transfer from/(to) Budget Stabilization	-	202,276	500,000	-	(500,000)		
Net Change Subtotal	551,838	(0)	(957,000)	-	957,000		
Other Strategic Transfers from/(to) Reserves	(415)	-	957,000	-	(957,000)		
Net Change in Cash & Reserve Transfers	\$ 551,423	\$ (0)	\$ (0)	\$ -	\$ 0		

Univ of Maine at Fort Kent
FY25 PROPOSED BUDGET

	E&G			Proposed			
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE		
Revenues							
Tuition & Fee Revenue	\$ 6,709,721	\$ 5,723,620	\$ 6,126,110	\$ 6,935,463	\$ 809,353	13.2%	
Tuition Waivers/Scholarships	(1,050,884)	(893,885)	(879,484)	(904,242)	(24,758)	2.8%	
Net Student Charges Revenue	5,658,837	4,829,735	5,246,626	6,031,221	784,595	15.0%	
State Appropriation	8,590,375	8,737,138	8,823,901	8,912,140	88,239	1.0%	
HEERF Relief - Lost Revenue	928,261	621,138	-	-	-	-%	
Indirect Cost Recovery	46,782	33,949	33,500	24,500	(9,000)	-26.9%	
Investment Income/Gifts	-	-	-	-	-	-%	
Sales/Services/Auxiliary	279,446	73,344	205,309	289,695	84,386	41.1%	
Total Revenue	15,503,701	14,295,304	14,309,336	15,257,556	948,220	6.6%	
Expenses							
Salaries, Wages & Benefits	\$9,055,921	\$8,595,472	\$9,665,976	\$9,691,402	\$25,426	0.3%	
Attrition (Salary Only)	-	-	(150,000)	(312,193)	(162,193)	108.1%	
Personnel	9,055,921	8,595,472	9,515,976	9,379,209	(136,767)	-1.4%	
Other Expenses & Transfers:							
Fuel & Electricity	462,330	259,753	427,802	421,219	(6,583)	-1.5%	
Supplies & Services	1,379,682	1,431,193	1,177,076	840,553	(336,523)	-28.6%	
Shared Services	2,114,866	2,058,205	2,177,322	2,208,738	31,416	1.4%	
Travel	299,530	426,891	355,008	373,013	18,005	5.1%	
Memberships, Contributions & Sponsorships	48,948	39,808	48,455	46,605	(1,850)	-3.8%	
Maintenance & Alterations	123,670	158,426	142,950	161,550	18,600	13.0%	
Interest	20,328	15,044	10,230	7,194	(3,036)	-29.7%	
Depreciation	806,310	887,864	882,116	1,023,670	141,554	16.0%	
Other Expenses	323,265	370,443	424,597	382,473	(42,124)	-9.9%	
Unassigned Budget	-	-	23,244	13,050	(10,194)	-43.9%	
Transfers - Other	294,207	368,914	(189,749)	(181,720)	8,029	-4.2%	
Total Other Expenses & Transfers	5,873,135	6,016,541	5,479,051	5,296,345	(182,706)	-3.3%	
Total Operating Expenses & Transfers	14,929,056	14,612,013	14,995,027	14,675,554	(319,473)	-2.1%	
Operating Increase (Decrease)	\$ 574,645	\$ (316,709)	\$ (685,691)	\$ 582,002	\$ 1,267,693	-184.9%	
Modified Cash Flow							
Operating Increase (Decrease)	\$ 574,645	\$ (316,709)	\$ (685,691)	\$ 582,002	\$ 1,267,693	-184.9%	
Add Back Depreciation	806,310	887,864	882,116	1,023,670	141,554	16.0%	
Less Capital Expenditures	(385,501)	(293,603)	(455,434)	(489,000)	(33,566)	7.4%	
Less Capital Reserve Funding	-	-	-	-	-	-%	
Less Debt Service Principal	(358,701)	(277,923)	(300,089)	(280,874)	19,215	-6.4%	
Net Change Before Other Adjustments & Transfers	636,753	(370)	(559,098)	835,798	1,394,896		
Transfer from/(to) Strategic Reserve	-	-	-	-	-		
Transfer from/(to) Budget Stabilization	-	370	500,000	-	(500,000)		
Net Change Subtotal	636,753	(0)	(59,098)	835,798	894,896		
Other Strategic Transfers from/(to) Reserves	(415)	-	59,228	-	(59,228)		
Net Change in Cash & Reserve Transfers	\$ 636,338	\$ (0)	\$ 130	\$ 835,798	\$ 835,668		

Univ of Maine at Fort Kent FY25 PROPOSED BUDGET						
	Auxiliary		Proposed		BUDGET CHANGE	
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE		
Revenues						
Tuition & Fee Revenue	\$ -	\$ -	\$ -	\$ -	\$ -	-%
Dining Revenue	534,142	411,908	480,967	535,780	54,813	11.4%
Residence Revenue	655,507	556,776	619,748	638,962	19,214	3.1%
Tuition Waivers/Scholarships	(158,830)	(111,818)	(139,000)	(122,849)	16,151	-11.6%
Net Student Charges Revenue	1,030,819	856,867	961,715	1,051,893	90,178	9.4%
State Appropriation	-	-	-	-	-	-%
HEERF Relief - Lost Revenue	297,529	232,746	-	-	-	-%
Indirect Cost Recovery	-	-	-	-	-	-%
Investment Income/Gifts	-	-	-	-	-	-%
Sales/Services/Auxiliary	109,582	87,453	76,650	79,600	2,950	3.8%
Total Revenue	1,437,931	1,177,066	1,038,365	1,131,493	93,128	9.0%
Expenses						
Salaries, Wages & Benefits	\$350,113	\$404,389	\$388,750	\$372,162	(\$16,588)	-4.3%
Attrition (Salary Only)	-	-	-	-	-	-%
Personnel	350,113	404,389	388,750	372,162	(16,588)	-4.3%
Other Expenses & Transfers:						
Fuel & Electricity	165,136	154,775	217,038	220,708	3,670	1.7%
Supplies & Services	878,202	861,071	785,000	881,422	96,422	12.3%
Shared Services	-	-	-	-	-	-%
Travel	89	-	3,000	3,000	-	0.0%
Memberships, Contributions & Sponsorships	90	125	90	125	35	38.9%
Maintenance & Alterations	49,567	45,233	51,600	51,600	-	0.0%
Interest	173,912	160,703	131,898	134,395	2,497	1.9%
Depreciation	233,041	230,907	229,399	222,299	(7,100)	-3.1%
Other Expenses	49,000	62,396	47,560	46,013	(1,547)	-3.3%
Unassigned Budget	-	-	-	-	-	-%
Transfers - Other	(421,549)	(606,920)	-	-	-	-%
Total Other Expenses & Transfers	1,127,487	908,290	1,465,585	1,559,562	93,977	6.4%
Total Operating Expenses & Transfers	1,477,600	1,312,679	1,854,335	1,931,724	77,389	4.2%
Operating Increase (Decrease)	\$ (39,670)	\$ (135,613)	\$ (815,970)	\$ (800,231)	\$ 15,739	-1.9%
Modified Cash Flow						
Operating Increase (Decrease)	\$ (39,670)	(135,613)	(815,970)	(800,231)	15,739	-1.9%
Add Back Depreciation	233,041	230,907	229,399	222,299	(7,100)	-3.1%
Less Capital Expenditures	(7,378)	(11,083)	-	-	-	-%
Less Capital Reserve Funding	-	-	-	-	-	-%
Less Debt Service Principal	(270,909)	(286,118)	(311,331)	(257,866)	53,465	-17.2%
Net Change Before Other Adjustments & Transfers	(84,915)	(201,906)	(897,902)	(835,798)	62,104	
Transfer from/(to) Strategic Reserve	-	-	-	-	-	
Transfer from/(to) Budget Stabilization	-	201,906	-	-	-	
Net Change Subtotal	(84,915)	-	(897,902)	(835,798)	62,104	
Other Strategic Transfers from/(to) Reserves	-	-	897,772	-	(897,772)	
Net Change in Cash & Reserve Transfers	\$ (84,915)	\$ -	\$ (130)	\$ (835,798)	\$ (835,668)	

Univ of Maine at Presque Isle											
FY25 PROPOSED BUDGET											
	Unrestricted E&G and Auxiliary			Proposed		BUDGET CHANGE					
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE							
Revenues											
Tuition & Fee Revenue	\$	8,490,578	\$	9,351,014	\$	11,805,402	\$	15,425,582	\$	3,620,180	30.7%
Dining Revenue		565,732		791,701		870,000		971,250		101,250	11.6%
Residence Revenue		849,948		900,302		1,005,315		1,081,650		76,335	7.6%
Tuition Waivers/Scholarships		(1,101,450)		(1,053,830)		(1,145,000)		(1,202,500)		(57,500)	5.0%
Net Student Charges Revenue		8,804,808		9,989,187		12,535,717		16,275,982		3,740,265	29.8%
State Appropriation		8,616,602		8,813,733		8,900,761		8,989,769		89,008	1.0%
HEERF Relief - Lost Revenue		680,474		92,089		-		-		-	-%
Indirect Cost Recovery		149,884		152,122		170,000		170,000		-	0.0%
Investment Income/Gifts		-		-		-		-		-	-%
Sales/Services/Auxiliary		214,683		334,476		324,668		334,560		9,892	3.0%
Total Revenue		18,466,451		19,381,607		21,931,146		25,770,311		3,839,165	17.5%
Expenses											
Salaries, Wages & Benefits		\$12,810,104		\$12,661,316		\$13,318,979		\$15,370,266		\$2,051,287	15.4%
Attrition (Salary Only)		-		-		(4,754)		-		4,754	-100.0%
Personnel		12,810,104		12,661,316		13,314,225		15,370,266		2,056,041	15.4%
Other Expenses & Transfers:											
Fuel & Electricity		891,710		1,123,202		901,795		1,010,000		108,205	12.0%
Supplies & Services		2,692,943		3,434,835		3,142,283		2,340,611		(801,672)	-25.5%
Shared Services		2,294,515		2,413,657		2,553,603		2,634,967		81,364	3.2%
Travel		185,121		287,872		291,350		340,669		49,319	16.9%
Memberships, Contributions & Sponsorships		40,785		42,262		75,578		73,018		(2,561)	-3.4%
Maintenance & Alterations		598,822		456,300		636,675		648,067		11,392	1.8%
Interest		50,012		45,876		69,749		79,368		9,619	13.8%
Depreciation		995,219		1,220,566		1,468,743		1,501,212		32,469	2.2%
Other Expenses		689,511		178,961		852,482		1,092,844		240,362	28.2%
Unassigned Budget		-		-		-		-		-	-%
Transfers - Other		(844,840)		(424,085)		(449,940)		(257,350)		192,590	-42.8%
Total Other Expenses & Transfers		7,593,797		8,779,446		9,542,318		9,463,405		(78,913)	-0.8%
Total Operating Expenses & Transfers		20,403,900		21,440,762		22,856,543		24,833,671		1,977,128	8.7%
Operating Increase (Decrease)	\$	(1,937,450)	\$	(2,059,156)	\$	(925,397)	\$	936,640	\$	1,862,037	-201.2%
Modified Cash Flow											
Operating Increase (Decrease)	\$	(1,937,450)	\$	(2,059,156)	\$	(925,397)	\$	936,640	\$	1,862,037	-201.2%
Add Back Depreciation		995,219		1,220,566		1,468,743		1,501,212		32,469	2.2%
Less Capital Expenditures		(269,995)		(819,415)		(384,543)		(403,770)		(19,227)	5.0%
Less Capital Reserve Funding		(122,184)		-		-		-		-	-%
Less Debt Service Principal		(102,096)		(108,239)		(373,431)		(334,901)		38,530	-10.3%
Net Change Before Other Adjustments & Transfers		(1,436,506)		(1,766,243)		(214,628)		1,699,181		1,913,809	
Transfer from/(to) Strategic Reserve		-		-		-		-		-	
Transfer from/(to) Budget Stabilization		1,425,763		1,766,243		214,628		-		(214,628)	
Net Change Subtotal		(10,743)		-		-		1,699,181		1,699,181	
Other Strategic Transfers from/(to) Reserves		10,743		-		-		-		-	
Net Change in Cash & Reserve Transfers	\$	(0)	\$	-	\$	-	\$	1,699,181	\$	1,699,181	

Univ of Maine at Presque Isle						
FY25 PROPOSED BUDGET						
	E&G and Auxiliary			Proposed		
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE	
Revenues						
Tuition & Fee Revenue	\$ 8,490,578	\$ 9,351,014	\$ 11,805,402	\$ 15,425,582	\$ 3,620,180	30.7%
Tuition Waivers/Scholarships	(882,308)	(823,814)	(920,000)	(977,500)	(57,500)	6.3%
Net Student Charges Revenue	7,608,270	8,527,200	10,885,402	14,448,082	3,562,680	32.7%
State Appropriation	8,616,602	8,813,733	8,900,761	8,989,769	89,008	1.0%
HEERF Relief - Lost Revenue	-	92,089	-	-	-	-%
Indirect Cost Recovery	149,884	152,122	170,000	170,000	-	0.0%
Investment Income/Gifts	-	-	-	-	-	-%
Sales/Services/Auxiliary	175,238	299,189	299,668	312,560	12,892	4.3%
Total Revenue	16,549,993	17,884,333	20,255,831	23,920,411	3,664,580	18.1%
Expenses						
Salaries, Wages & Benefits	\$12,436,933	\$12,366,483	\$12,981,177	\$15,037,317	\$2,056,140	15.8%
Attrition (Salary Only)	-	-	(4,754)	-	4,754	-100.0%
Personnel	12,436,933	12,366,483	12,976,423	15,037,317	2,060,894	15.9%
Other Expenses & Transfers:						
Fuel & Electricity	541,905	699,051	561,295	637,800	76,505	13.6%
Supplies & Services	1,825,654	2,448,213	2,242,101	1,288,724	(953,377)	-42.5%
Shared Services	2,294,515	2,413,657	2,553,603	2,634,967	81,364	3.2%
Travel	184,837	287,097	290,850	339,919	49,069	16.9%
Memberships, Contributions & Sponsorships	40,785	42,262	75,078	72,518	(2,561)	-3.4%
Maintenance & Alterations	417,227	340,594	397,375	409,567	12,192	3.1%
Interest	49,453	45,547	69,634	79,360	9,726	14.0%
Depreciation	923,817	1,156,744	1,416,044	1,373,612	(42,432)	-3.0%
Other Expenses	455,191	75,255	697,303	923,639	226,336	32.5%
Unassigned Budget	-	-	-	-	-	-%
Transfers - Other	(844,840)	(424,085)	(449,940)	(257,350)	192,590	-42.8%
Total Other Expenses & Transfers	5,888,543	7,084,336	7,853,343	7,502,755	(350,588)	-4.5%
Total Operating Expenses & Transfers	18,325,476	19,450,819	20,829,766	22,540,072	1,710,306	8.2%
Operating Increase (Decrease)	\$ (1,775,483)	\$ (1,566,486)	\$ (573,935)	\$ 1,380,339	\$ 1,954,274	-340.5%
Modified Cash Flow						
Operating Increase (Decrease)	\$ (1,775,483)	\$ (1,566,486)	\$ (573,935)	\$ 1,380,339	\$ 1,954,274	-340.5%
Add Back Depreciation	923,817	1,156,744	1,416,044	1,373,612	(42,432)	-3.0%
Less Capital Expenditures	(144,610)	(693,979)	(262,695)	(275,830)	(13,135)	5.0%
Less Capital Reserve Funding	(122,184)	-	-	-	-	-%
Less Debt Service Principal	(91,943)	(97,855)	(366,516)	(333,459)	33,057	-9.0%
Net Change Before Other Adjustments & Transfers	(1,210,402)	(1,201,576)	212,898	2,144,663	1,931,765	
Transfer from/(to) Strategic Reserve	-	-	-	-	-	
Transfer from/(to) Budget Stabilization	1,199,659	1,201,576	-	-	-	
Net Change Subtotal	(10,743)	-	212,898	2,144,663	1,931,765	
Other Strategic Transfers from/(to) Reserves	10,743	-	-	-	-	
Net Change in Cash & Reserve Transfers	\$ (0)	\$ -	\$ 212,898	\$ 2,144,663	\$ 1,931,765	

Univ of Maine at Presque Isle						
FY25 PROPOSED BUDGET						
	Auxiliary		Proposed			
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE	
Revenues						
Tuition & Fee Revenue	\$ -	\$ -	\$ -	\$ -	\$ -	-%
Dining Revenue	565,732	791,701	870,000	971,250	101,250	11.6%
Residence Revenue	849,948	900,302	1,005,315	1,081,650	76,335	7.6%
Tuition Waivers/Scholarships	(219,142)	(230,016)	(225,000)	(225,000)	-	0.0%
Net Student Charges Revenue	1,196,538	1,461,987	1,650,315	1,827,900	177,585	10.8%
State Appropriation	-	-	-	-	-	-%
HEERF Relief - Lost Revenue	680,474	-	-	-	-	-%
Indirect Cost Recovery	-	-	-	-	-	-%
Investment Income/Gifts	-	-	-	-	-	-%
Sales/Services/Auxiliary	39,445	35,287	25,000	22,000	(3,000)	-12.0%
Total Revenue	1,916,457	1,497,274	1,675,315	1,849,900	174,585	10.4%
Expenses						
Salaries, Wages & Benefits	\$373,171	\$294,833	\$337,802	\$332,949	(\$4,853)	-1.4%
Attrition (Salary Only)	-	-	-	-	-	-%
Personnel	373,171	294,833	337,802	332,949	(4,853)	-1.4%
Other Expenses & Transfers:						
Fuel & Electricity	349,805	424,151	340,500	372,200	31,700	9.3%
Supplies & Services	867,288	986,622	900,182	1,051,887	151,705	16.9%
Shared Services	-	-	-	-	-	-%
Travel	284	775	500	750	250	50.0%
Memberships, Contributions & Sponsorships	-	-	500	500	-	0.0%
Maintenance & Alterations	181,595	115,706	239,300	238,500	(800)	-0.3%
Interest	559	328	115	8	(107)	-93.3%
Depreciation	71,402	63,822	52,699	127,600	74,901	142.1%
Other Expenses	234,320	103,707	155,179	169,205	14,026	9.0%
Unassigned Budget	-	-	-	-	-	-%
Transfers - Other	-	-	-	-	-	-%
Total Other Expenses & Transfers	1,705,253	1,695,110	1,688,975	1,960,650	271,675	16.1%
Total Operating Expenses & Transfers	2,078,424	1,989,944	2,026,777	2,293,599	266,822	13.2%
Operating Increase (Decrease)	\$ (161,967)	\$ (492,670)	\$ (351,462)	\$ (443,699)	\$ (92,237)	26.2%
Modified Cash Flow						
Operating Increase (Decrease)	\$ (161,967)	\$ (492,670)	\$ (351,462)	\$ (443,699)	\$ (92,237)	26.2%
Add Back Depreciation	71,402	63,822	52,699	127,600	74,901	142.1%
Less Capital Expenditures	(125,385)	(125,436)	(121,848)	(127,940)	(6,092)	5.0%
Less Capital Reserve Funding	-	-	-	-	-	-%
Less Debt Service Principal	(10,154)	(10,384)	(6,915)	(1,443)	5,472	-79.1%
Net Change Before Other Adjustments & Transfers	(226,104)	(564,668)	(427,526)	(445,482)	(17,956)	
Transfer from/(to) Strategic Reserve	-	-	-	-	-	
Transfer from/(to) Budget Stabilization	226,104	564,668	214,628	-	(214,628)	
Net Change Subtotal	-	-	(212,898)	(445,482)	(232,584)	
Other Strategic Transfers from/(to) Reserves	-	-	-	-	-	
Net Change in Cash & Reserve Transfers	\$ -	\$ -	\$ (212,898)	\$ (445,482)	\$ (232,584)	

University of Southern Maine							
FY25 PROPOSED BUDGET							
	E&G and Auxiliary			Proposed			
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE		
Revenues							
Tuition & Fee Revenue	\$ 70,400,694	\$ 69,441,317	\$ 73,538,571	\$ 78,673,733	\$ 5,135,162	7.0%	
Dining Revenue	5,236,664	5,965,813	6,640,657	6,640,657	-	0.0%	
Residence Revenue	7,152,344	7,693,592	15,718,570	15,518,570	(200,000)	-1.3%	
Tuition Waivers/Scholarships	(17,052,879)	(16,411,242)	(16,551,681)	(17,461,181)	(909,500)	5.5%	
Net Student Charges Revenue	65,736,823	66,689,480	79,346,117	83,371,779	4,025,662	5.1%	
State Appropriation	47,714,871	51,147,985	51,638,080	52,354,461	716,381	1.4%	
HEERF Relief - Lost Revenue	9,877,456	-	-	-	-	-%	
Indirect Cost Recovery	4,221,959	4,350,425	4,225,000	4,225,000	-	0.0%	
Investment Income/Gifts	113,045	118,032	113,769	139,087	25,318	22.3%	
Sales/Services/Auxiliary	3,067,229	3,879,756	5,520,168	5,452,883	(67,285)	-1.2%	
Total Revenue	130,731,382	126,185,679	140,843,134	145,543,210	4,700,076	3.3%	
Expenses							
Salaries, Wages & Benefits	\$89,783,390	\$89,725,883	\$93,277,460	\$91,696,584	(\$1,580,876)	-1.7%	
Attrition (Salary Only)	-	-	(3,689,438)	(2,575,555)	1,113,883	-30.2%	
Personnel	89,783,390	89,725,883	89,588,022	89,121,029	(466,993)	-0.5%	
Other Expenses & Transfers:							
Fuel & Electricity	2,952,865	2,662,119	5,020,451	5,362,760	342,309	6.8%	
Supplies & Services	12,066,590	13,817,210	11,627,235	12,725,184	1,097,949	9.4%	
Shared Services	12,941,675	12,631,864	13,511,775	13,571,812	60,037	0.4%	
Travel	893,210	983,956	883,762	1,344,230	460,468	52.1%	
Memberships, Contributions & Sponsorships	228,390	203,459	182,450	176,186	(6,264)	-3.4%	
Maintenance & Alterations	2,934,150	3,449,640	3,245,357	3,232,528	(12,829)	-0.4%	
Interest	1,374,830	1,252,707	5,779,861	5,780,360	499	0.0%	
Depreciation	7,930,517	8,053,018	10,111,243	11,152,583	1,041,340	10.3%	
Other Expenses	2,698,178	3,877,871	3,752,414	4,151,730	399,316	10.6%	
Unassigned Budget	-	-	129,605	369,605	240,000	185.2%	
Transfers - Other	(2,598,006)	(547,476)	(929,125)	194,431	1,123,556	-120.9%	
Total Other Expenses & Transfers	41,422,400	46,384,366	53,315,028	58,061,409	4,746,381	8.9%	
Total Operating Expenses & Transfers	131,205,790	136,110,250	142,903,050	147,182,438	4,279,388	3.0%	
Operating Increase (Decrease)	\$ (474,408)	\$ (9,924,571)	\$ (2,059,916)	\$ (1,639,228)	\$ 420,688	-20.4%	
Modified Cash Flow							
Operating Increase (Decrease)	\$ (474,408)	\$ (9,924,571)	\$ (2,059,916)	\$ (1,639,228)	\$ 420,688	-20.4%	
Add Back Depreciation	7,930,517	8,053,018	10,111,243	11,152,583	1,041,340	10.3%	
Less Capital Expenditures	(2,650,147)	(4,070,396)	(4,158,910)	(4,158,910)	-	0.0%	
Less Capital Reserve Funding	(533,986)	-	-	(550,000)	(550,000)	-%	
Less Debt Service Principal	(2,787,317)	(2,908,275)	(3,958,658)	(4,804,445)	(845,787)	21.4%	
Net Change Before Other Adjustments & Transfers	1,484,660	(8,850,225)	(66,241)	-	66,241		
Transfer from/(to) Strategic Reserve	-	-	-	-	-		
Transfer from/(to) Budget Stabilization	-	-	-	-	-		
Net Change Subtotal	1,484,660	(8,850,225)	(66,241)	-	66,241		
Other Strategic Transfers from/(to) Reserves	1,823,471	32,230	-	-	-		
Net Change in Cash & Reserve Transfers	\$ 3,308,131	\$ (8,817,995)	\$ (66,241)	\$ -	\$ 66,241		

University of Southern Maine						
FY25 PROPOSED BUDGET						
	E&G		Proposed			
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE	
Revenues						
Tuition & Fee Revenue	\$ 70,402,193	\$ 69,441,454	\$ 72,538,571	\$ 77,623,733	\$ 5,085,162	7.0%
Dining Revenue	-	-	-	-	-	-%
Residence Revenue	26,668	36,064	-	-	-	-%
Tuition Waivers/Scholarships	(16,539,730)	(15,843,780)	(15,875,913)	(16,740,413)	(864,500)	5.4%
Net Student Charges Revenue	53,889,131	53,633,738	56,662,658	60,883,320	4,220,662	7.4%
State Appropriation	47,714,871	51,147,985	51,638,080	52,354,461	716,381	1.4%
HEERF Relief - Lost Revenue	4,112,718	-	-	-	-	-%
Indirect Cost Recovery	4,221,959	4,350,425	4,225,000	4,225,000	-	0.0%
Investment Income/Gifts	113,045	118,032	113,769	139,087	25,318	22.3%
Sales/Services/Auxiliary	2,294,712	3,157,365	4,343,290	4,266,005	(77,285)	-1.8%
Total Revenue	112,346,435	112,407,545	116,982,797	121,867,873	4,885,076	4.2%
Expenses						
Salaries, Wages & Benefits	\$87,087,720	\$86,907,862	\$89,844,489	\$88,419,519	(\$1,424,970)	-1.6%
Attrition (Salary Only)	-	-	(3,689,438)	(2,575,555)	1,113,883	-30.2%
Personnel	87,087,720	86,907,862	86,155,051	85,843,964	(311,087)	-0.4%
Other Expenses & Transfers:						
Fuel & Electricity	1,915,490	1,844,664	3,350,206	3,581,412	231,206	6.9%
Supplies & Services	7,205,912	8,401,757	5,631,546	6,719,478	1,087,932	19.3%
Shared Services	12,941,675	12,631,864	13,511,775	13,571,812	60,037	0.4%
Travel	888,337	971,965	868,365	1,328,833	460,468	53.0%
Memberships, Contributions & Sponsorships	226,951	200,908	181,259	174,995	(6,264)	-3.5%
Maintenance & Alterations	2,289,720	2,456,361	2,157,683	2,152,379	(5,304)	-0.2%
Interest	499,259	443,744	410,881	382,239	(28,642)	-7.0%
Depreciation	6,527,585	6,591,033	8,294,929	7,719,343	(575,586)	-6.9%
Other Expenses	658,537	1,691,822	1,127,529	1,763,558	636,029	56.4%
Unassigned Budget	-	-	11,408	251,408	240,000	2103.8%
Transfers - Other	(7,011,604)	(714,760)	(1,361,162)	(327,829)	1,033,333	-75.9%
Total Other Expenses & Transfers	26,141,862	34,519,358	34,184,419	37,317,628	3,133,209	9.2%
Total Operating Expenses & Transfers	113,229,583	121,427,219	120,339,470	123,161,592	2,822,122	2.3%
Operating Increase (Decrease)	\$ (883,147)	\$ (9,019,674)	\$ (3,356,673)	\$ (1,293,719)	\$ 2,062,954	-61.5%
Modified Cash Flow						
Operating Increase (Decrease)	\$ (883,147)	\$ (9,019,674)	\$ (3,356,673)	\$ (1,293,719)	\$ 2,062,954	-61.5%
Add Back Depreciation	6,527,585	6,591,033	8,294,929	7,719,343	(575,586)	-6.9%
Less Capital Expenditures	(2,092,817)	(3,532,566)	(3,862,463)	(3,862,463)	-	0.0%
Less Capital Reserve Funding	(533,986)	-	-	(550,000)	(550,000)	-%
Less Debt Service Principal	(1,382,832)	(1,435,967)	(1,679,226)	(2,369,655)	(690,429)	41.1%
Net Change Before Other Adjustments & Transfers	1,634,802	(7,397,174)	(603,433)	(356,494)	246,939	
Transfer from/(to) Strategic Reserve	-	-	-	-	-	
Transfer from/(to) Budget Stabilization	-	-	-	-	-	
Net Change Subtotal	1,634,802	(7,397,174)	(603,433)	(356,494)	246,939	
Other Strategic Transfers from/(to) Reserves	1,231,416	32,230	-	-	-	
Net Change in Cash & Reserve Transfers	\$ 2,866,218	\$ (7,364,944)	\$ (603,433)	\$ (356,494)	\$ 246,939	

University of Southern Maine							
FY25 PROPOSED BUDGET							
	Auxiliary		Proposed				
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE		
Revenues							
Tuition & Fee Revenue	\$ (1,499)	\$ (138)	\$ 1,000,000	\$ 1,050,000	\$ 50,000	5.0%	
Dining Revenue	5,236,664	5,965,813	6,640,657	6,640,657	-	0.0%	
Residence Revenue	7,125,676	7,657,528	15,718,570	15,518,570	(200,000)	-1.3%	
Tuition Waivers/Scholarships	(513,149)	(567,462)	(675,768)	(720,768)	(45,000)	6.7%	
Net Student Charges Revenue	11,847,692	13,055,742	22,683,459	22,488,459	(195,000)	-0.9%	
State Appropriation	-	-	-	-	-	-%	
HEERF Relief - Lost Revenue	5,764,738	-	-	-	-	-%	
Indirect Cost Recovery	-	-	-	-	-	-%	
Investment Income/Gifts	-	-	-	-	-	-%	
Sales/Services/Auxiliary	772,517	722,391	1,176,878	1,186,878	10,000	0.8%	
Total Revenue	18,384,947	13,778,133	23,860,337	23,675,337	(185,000)	-0.8%	
Expenses							
Salaries, Wages & Benefits	\$2,695,670	\$2,818,022	\$3,432,971	\$3,277,065	(\$155,906)	-4.5%	
Attrition (Salary Only)	-	-	-	-	-	-%	
Personnel	2,695,670	2,818,022	3,432,971	3,277,065	(155,906)	-4.5%	
Other Expenses & Transfers:							
Fuel & Electricity	1,037,374	817,455	1,670,245	1,781,348	111,103	6.7%	
Supplies & Services	4,860,678	5,415,453	5,995,689	6,005,706	10,017	0.2%	
Shared Services	-	-	-	-	-	-%	
Travel	4,873	11,991	15,397	15,397	-	0.0%	
Memberships, Contributions & Sponsorships	1,439	2,551	1,191	1,191	-	0.0%	
Maintenance & Alterations	644,430	993,279	1,087,674	1,080,149	(7,525)	-0.7%	
Interest	875,571	808,963	5,368,980	5,398,121	29,141	0.5%	
Depreciation	1,402,932	1,461,984	1,816,314	3,433,240	1,616,926	89.0%	
Other Expenses	2,039,641	2,186,049	2,624,885	2,388,172	(236,713)	-9.0%	
Unassigned Budget	-	-	118,197	118,197	-	0.0%	
Transfers - Other	4,413,598	167,284	432,037	522,260	90,223	20.9%	
Total Other Expenses & Transfers	15,280,537	11,865,009	19,130,609	20,743,781	1,613,172	8.4%	
Total Operating Expenses & Transfers	17,976,207	14,683,030	22,563,580	24,020,846	1,457,266	6.5%	
Operating Increase (Decrease)	\$ 408,740	\$ (904,897)	\$ 1,296,757	\$ (345,509)	\$ (1,642,266)	-126.6%	
Modified Cash Flow							
Operating Increase (Decrease)	\$ 408,740	\$ (904,897)	\$ 1,296,757	\$ (345,509)	\$ (1,642,266)	-126.6%	
Add Back Depreciation	1,402,932	1,461,984	1,816,314	3,433,240	1,616,926	89.0%	
Less Capital Expenditures	(557,330)	(537,830)	(296,447)	(296,447)	-	0.0%	
Less Capital Reserve Funding	-	-	-	-	-	-%	
Less Debt Service Principal	(1,404,485)	(1,472,308)	(2,279,432)	(2,434,790)	(155,358)	6.8%	
Net Change Before Other Adjustments & Transfers	(150,142)	(1,453,051)	537,192	356,494	(180,698)		
Transfer from/(to) Strategic Reserve	-	-	-	-	-		
Transfer from/(to) Budget Stabilization	-	-	-	-	-		
Net Change Subtotal	(150,142)	(1,453,051)	537,192	356,494	(180,698)		
Other Strategic Transfers from/(to) Reserves	592,056	-	-	-	-		
Net Change in Cash & Reserve Transfers	\$ 441,913	\$ (1,453,051)	\$ 537,192	\$ 356,494	\$ (180,698)		

**University of Maine School of Law
FY25 PROPOSED BUDGET**

	Unrestricted E&G			Proposed		
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE	
<u>Revenues</u>						
Tuition & Fee Revenue	\$ 6,765,380	\$ 7,200,938	\$ 8,003,593	\$ 8,647,035	\$ 643,442	8.0%
Dining Revenue	-	-	-	-	-	-%
Residence Revenue	-	-	-	-	-	-%
Tuition Waivers/Scholarships	(2,951,318)	(2,480,309)	(3,531,181)	(3,819,890)	(288,709)	8.2%
Net Student Charges Revenue	3,814,062	4,720,629	4,472,412	4,827,145	354,733	7.9%
State Appropriation	3,281,808	3,908,237	4,408,237	4,908,237	500,000	11.3%
HEERF Relief - Lost Revenue	-	-	-	-	-	-%
Indirect Cost Recovery	-	-	-	-	-	-%
Investment Income/Gifts	65,198	66,448	569,984	420,799	(149,185)	-26.2%
Sales/Services/Auxiliary	9,085	22,979	219,860	8,270	(211,590)	-96.2%
Total Revenue	7,170,153	8,718,293	9,670,493	10,164,451	493,958	5.1%
<u>Expenses</u>						
Salaries, Wages & Benefits	\$6,218,677	\$6,618,177	\$7,919,832	\$8,134,663	\$214,831	2.7%
Attrition (Salary Only)	-	-	(305,282)	(105,000)	200,282	-65.6%
Personnel	6,218,677	6,618,177	7,614,550	8,029,663	415,113	5.5%
Other Expenses & Transfers:						
Fuel & Electricity	119,302	152,321	206,000	-	(206,000)	-100.0%
Supplies & Services	189,331	466,585	585,000	491,001	(93,999)	-16.1%
Shared Services	-	289,662	433,512	424,846	(8,666)	-2.0%
Travel	11,576	82,797	87,050	91,250	4,200	4.8%
Memberships, Contributions & Sponsorships	28,406	30,500	32,400	42,400	10,000	30.9%
Maintenance & Alterations	79,676	116,431	54,598	43,401	(11,197)	-20.5%
Interest	-	-	-	-	-	-%
Depreciation	-	-	-	-	-	-%
Other Expenses	1,737,570	1,999,920	1,988,564	1,041,890	(946,674)	-47.6%
Unassigned Budget	-	-	-	-	-	-%
Transfers - Other	-	-	-	-	-	-%
Total Other Expenses & Transfers	2,165,860	3,138,216	3,387,124	2,134,788	(1,252,336)	-37.0%
Total Operating Expenses & Transfers	8,384,537	9,756,393	11,001,674	10,164,451	(837,223)	-7.6%
Operating Increase (Decrease)	\$ (1,214,384)	\$ (1,038,100)	\$ (1,331,181)	\$ -	\$ 1,331,181	-100.0%
<u>Modified Cash Flow</u>						
Operating Increase (Decrease)	\$ (1,214,384)	\$ (1,038,100)	\$ (1,331,181)	\$ -	\$ 1,331,181	-100.0%
Add Back Depreciation	-	-	-	-	-	-%
Less Capital Expenditures	-	(7,892)	-	-	-	-%
Less Capital Reserve Funding	-	-	-	-	-	-%
Less Debt Service Principal	-	-	-	-	-	-%
Net Change Before Other Adjustments & Transfers	(1,214,384)	(1,045,992)	(1,331,181)	-	1,331,181	
Transfer from/(to) Strategic Reserve	-	-	-	-	-	
Transfer from/(to) Budget Stabilization	1,214,384	1,045,992	-	-	-	
Net Change Subtotal	-	-	(1,331,181)	-	1,331,181	
Other Strategic Transfers from/(to) Reserves	-	-	1,331,181	-	(1,331,181)	
Net Change in Cash & Reserve Transfers	\$ -	\$ -	\$ -	\$ -	\$ -	

Governance						
FY25 PROPOSED BUDGET						
	E&G			Proposed		
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE	
Revenues						
Tuition & Fee Revenue	\$ -	\$ -	\$ -	\$ -	\$ -	-%
Tuition Waivers/Scholarships	-	-	-	-	-	-%
Net Student Charges Revenue	-	-	-	-	-	-%
State Appropriation	5,533,635	6,739,537	6,714,619	6,714,619	-	0.0%
Sales/Services/Auxiliary	(115)	-	-	-	-	-%
Total Revenue	5,533,520	6,739,537	6,714,619	6,714,619	-	0.0%
Expenses						
Salaries, Wages & Benefits	\$4,687,766	\$5,025,791	\$5,477,660	\$5,395,467	(\$82,193)	-1.5%
Attrition (Salary Only)	-	-	-	(26,603)	(26,603)	-%
Personnel	4,687,766	5,025,791	5,477,660	5,368,864	(108,796)	-2.0%
Other Expenses & Transfers:						
Fuel & Electricity	-	-	-	-	-	-%
Supplies & Services	213,017	568,574	117,165	117,165	-	0.0%
Shared Services	793,825	809,877	1,131,231	1,109,255	(21,976)	-1.9%
Travel	66,227	103,374	132,750	132,551	(199)	-0.1%
Memberships, Contributions & Sponsorships	68,476	78,894	76,300	76,300	-	0.0%
Maintenance & Alterations	1,717	1,782	2,100	2,100	-	0.0%
Interest	-	-	-	-	-	-%
Depreciation	-	-	-	-	-	-%
Other Expenses	104,027	129,157	93,183	93,184	1	0.0%
Unassigned Budget	-	-	-	-	-	-%
Transfers - Other	(330,137)	(163,316)	(215,000)	(184,800)	30,200	-14.0%
Total Other Expenses & Transfers	917,152	1,528,342	1,337,729	1,345,755	8,026	0.6%
Total Operating Expenses & Transfers	5,604,918	6,554,133	6,815,389	6,714,619	(100,770)	-1.5%
Operating Increase (Decrease)	\$ (71,398)	\$ 185,404	\$ (100,770)	\$ -	\$ 100,770	-100.0%
Modified Cash Flow						
Operating Increase (Decrease)	\$ (71,398)	\$ 185,404	\$ (100,770)	\$ -	\$ 100,770	-100.0%
Add Back Depreciation	-	-	-	-	-	-%
Less Capital Expenditures	-	(5,115)	-	-	-	-%
Less Capital Reserve Funding	-	-	-	-	-	-%
Less Debt Service Principal	-	-	-	-	-	-%
Net Change Before Other Adjustments & Transfers	(71,398)	180,290	(100,770)	-	100,770	
Transfer from/(to) Strategic Reserve	-	-	-	-	-	
Transfer from/(to) Budget Stabilization	-	-	-	-	-	
Net Change Subtotal	(71,398)	180,290	(100,770)	-	100,770	
Other Strategic Transfers from/(to) Reserves	-	-	100,770	-	(100,770)	
Net Change in Cash & Reserve Transfers	\$ (71,398)	\$ 180,290	\$ -	\$ -	\$ -	

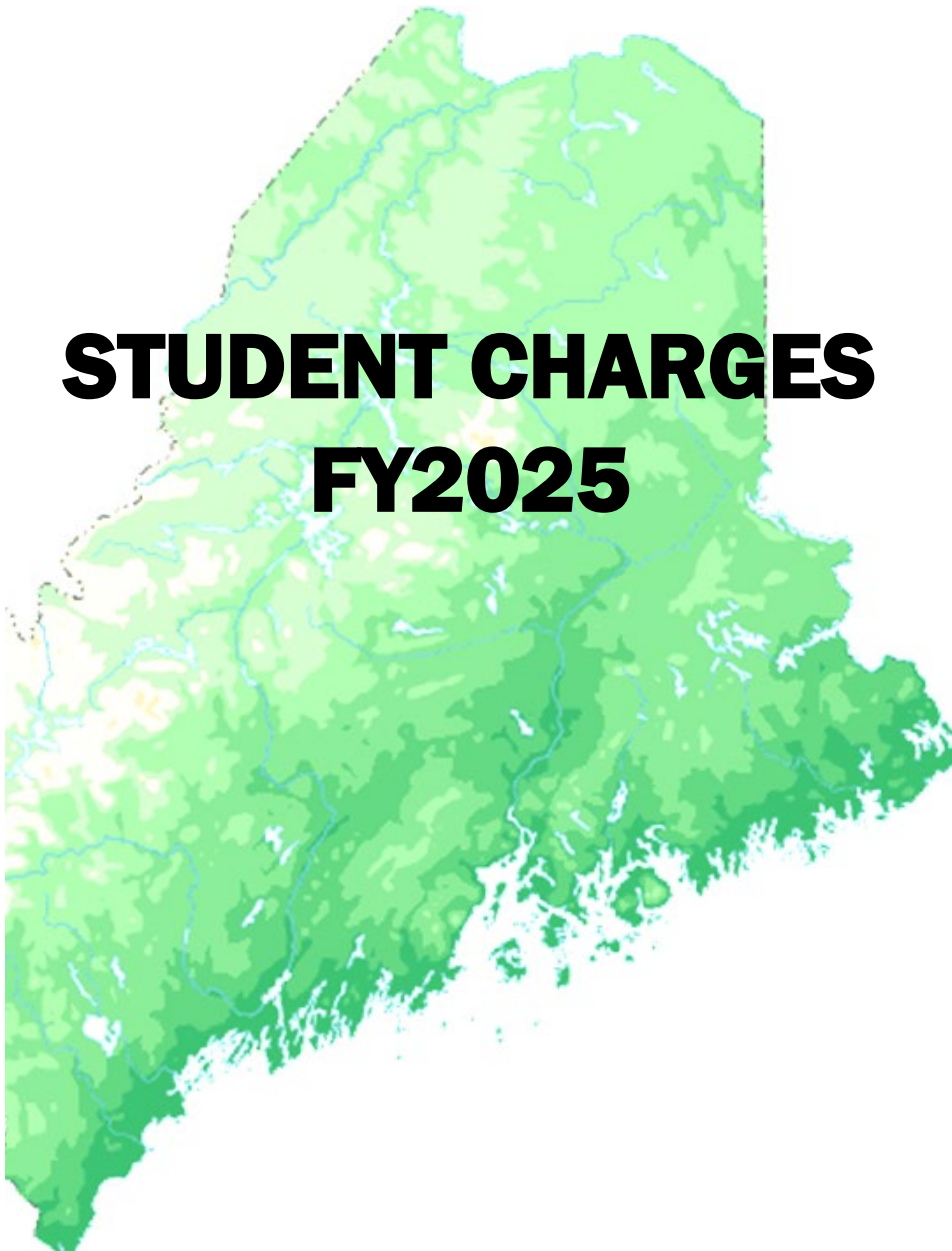
**Allocated University Services
FY25 PROPOSED BUDGET**

	E&G		Proposed			
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE	BUDGET CHANGE	
<u>Revenues</u>						
Tuition & Fee Revenue	\$ -	\$ -	\$ -	\$ -	\$ -	-%
Tuition Waivers/Scholarships	-	-	-	-	-	-%
Net Student Charges Revenue	-	-	-	-	-	-%
State Appropriation	-	-	-	-	-	-%
Indirect Cost Recovery	766	34,457	1,000	1,000	-	0.0%
Investment Income/Gifts	18,242	18,584	264,155	264,155	-	0.0%
Sales/Services/Auxiliary	760,182	917,816	645,582	615,582	(30,000)	-4.6%
Total Revenue	779,190	970,857	910,737	880,737	(30,000)	-3.3%
<u>Expenses</u>						
Salaries, Wages & Benefits	\$36,045,546	\$35,828,426	\$41,704,814	\$40,636,878	(\$1,067,936)	-2.6%
Attrition (Salary Only)	-	-	(598,493)	(669,894)	(71,401)	11.9%
Personnel	36,045,546	35,828,426	41,106,321	39,966,984	(1,139,337)	-2.8%
Other Expenses & Transfers:						
Fuel & Electricity	26,009	18,933	11,530	11,830	300	2.6%
Supplies & Services	5,838,266	6,491,547	6,595,600	7,784,705	1,189,105	18.0%
Shared Services	(48,825,322)	(49,683,514)	(53,163,746)	(53,062,216)	101,530	-0.2%
Travel	82,331	91,708	178,030	177,313	(717)	-0.4%
Memberships, Contributions & Sponsorships	98,107	98,652	105,096	104,836	(260)	-0.2%
Maintenance & Alterations	3,219,579	1,632,604	2,648,746	2,552,056	(96,690)	-3.7%
Interest	20,236	13,649	7,026	176	(6,850)	-97.5%
Depreciation	-	-	-	-	-	-%
Other Expenses	1,707,852	1,515,690	1,865,159	2,221,070	355,911	19.1%
Unassigned Budget	-	-	-	-	-	-%
Transfers - Other	708,008	959,775	523,438	136,852	(386,586)	-73.9%
Pooled Costs - Insurance	221,985	(382,714)	-	-	-	-%
Total Other Expenses & Transfers	(36,902,949)	(39,243,670)	(41,229,121)	(40,073,378)	1,155,743	-2.8%
Total Operating Expenses & Transfers	(857,403)	(3,415,244)	(122,800)	(106,394)	16,406	-13.4%
Operating Increase (Decrease)	\$ 1,636,593	\$ 4,386,101	\$ 1,033,537	\$ 987,131	\$ (46,406)	-4.5%
<u>Modified Cash Flow</u>						
Operating Increase (Decrease)	\$ 1,636,593	\$ 4,386,101	\$ 1,033,537	\$ 987,131	\$ (46,406)	-4.5%
Add Back Depreciation	-	-	-	-	-	-%
Less Capital Expenditures	(415,559)	(89,054)	(838,875)	(973,315)	(134,440)	16.0%
Less Capital Reserve Funding	-	-	-	-	-	-%
Less Debt Service Principal	(181,453)	(188,040)	(194,662)	(13,816)	180,846	-92.9%
Net Change Before Other Adjustments & Transfers	1,039,581	4,109,007	-	-	-	
Transfer from/(to) Strategic Reserve	-	-	-	-	-	
Transfer from/(to) Budget Stabilization	-	-	-	-	-	
Net Change Subtotal	1,039,581	4,109,007	-	-	-	
Other Strategic Transfers from/(to) Reserves	906,113	210,083	-	-	-	
Net Change in Cash & Reserve Transfers	\$ 1,945,694	\$ 4,319,090	\$ -	\$ -	\$ -	

Other Univ Svcs & Activities
FY25 PROPOSED BUDGET

	E&G		Proposed		BUDGET CHANGE	
	FY22 ACTUALS	FY23 ACTUALS	FY24 BASE	FY25 BASE		
<u>Revenues</u>						
Tuition & Fee Revenue	\$ -	\$ -	\$ -	\$ -	\$ -	-%
Tuition Waivers/Scholarships	(12,000)	-	-	-	-	-%
Net Student Charges Revenue	(12,000)	-	-	-	-	-%
State Appropriation	7,950,914	8,975,255	10,923,804	14,197,313	3,273,509	30.0%
Investment Income/Gifts	(13,947,980)	9,737,349	1,991,557	2,467,837	476,280	23.9%
Sales/Services/Auxiliary	639,261	448,537	11,800	242,452	230,652	1954.7%
Total Revenue	(5,369,806)	19,161,141	12,927,161	16,907,602	3,980,441	30.8%
<u>Expenses</u>						
Salaries, Wages & Benefits	\$1,227,773	\$1,336,536	\$1,793,763	\$1,673,941	(\$119,822)	-6.7%
Attrition (Salary Only)	-	-	-	-	-	-%
Personnel	1,227,773	1,336,536	1,793,763	1,673,941	(119,822)	-6.7%
Other Expenses & Transfers:						
Fuel & Electricity	-	-	-	231,500	231,500	-%
Supplies & Services	669,848	1,095,943	2,158,239	2,715,675	557,436	25.8%
Shared Services	-	-	-	-	-	-%
Travel	23,587	44,715	114,000	126,062	12,062	10.6%
Memberships, Contributions & Sponsorships	3,500	13,095	65,860	12,800	(53,060)	-80.6%
Maintenance & Alterations	6	16,897	3,100	17,880	14,780	476.8%
Interest	-	-	-	-	-	-%
Depreciation	3,817,972	4,190,881	4,334,007	6,233,933	1,899,926	43.8%
Other Expenses	58,163	47,181	283,856	2,141,914	1,858,058	654.6%
Unassigned Budget	-	-	70,864	767,649	696,785	983.3%
Transfers - Other	3,689,325	4,886,399	6,014,888	6,867,483	852,595	14.2%
Pooled Costs - Benefits	(1,130,536)	(7,176,601)	-	-	-	-%
Total Other Expenses & Transfers	7,131,865	3,118,510	13,044,814	19,114,896	6,070,082	46.5%
Total Operating Expenses & Transfers	8,359,637	4,455,047	14,838,577	20,788,837	5,950,260	40.1%
Operating Increase (Decrease)	\$ (13,729,443)	\$ 14,706,095	\$ (1,911,416)	\$ (3,881,235)	\$ (1,969,819)	103.1%
<u>Modified Cash Flow</u>						
Operating Increase (Decrease)	\$ (13,729,443)	\$ 14,706,095	\$ (1,911,416)	\$ (3,881,235)	\$ (1,969,819)	103.1%
Add Back Depreciation	3,817,972	4,190,881	4,334,007	6,233,933	1,899,926	43.8%
Less Capital Expenditures	(850,000)	(2,850,000)	(850,000)	(850,000)	-	0.0%
Less Capital Reserve Funding	-	(2,637,125)	(1,991,557)	(2,003,203)	(11,646)	0.6%
Less Debt Service Principal	-	-	-	-	-	-%
Net Change Before Other Adjustments & Transfers	(10,761,471)	13,409,851	(418,966)	(500,505)	(81,539)	
Transfer from/(to) Strategic Reserve	(1,647,974)	-	340,000	-	(340,000)	
Transfer from/(to) Budget Stabilization	-	(5,000,000)	-	-	-	
Net Change Subtotal	(12,409,445)	8,409,851	(78,966)	(500,505)	(421,539)	
Other Strategic Transfers from/(to) Reserves	(2,013,787)	(7,515,809)	78,966	500,505	421,539	
Net Change in Cash & Reserve Transfers	\$ (14,423,232)	\$ 894,042	\$ -	\$ -	\$ -	

STUDENT CHARGES FY2025



May 2024



**UNIVERSITY OF MAINE SYSTEM
STUDENT CHARGES
FY25
TABLE OF CONTENTS**

5.1

Total Student Charges	1-2
Credit Hour Tuition Rates	3-4
Annual Tuition Rates	5-6
Differential Tuition Rates	7
Annual Mandatory Fees	8-10
Annual Tuition and Mandatory Fees	11-12
Annual Room and Board Charges	13
Annual Comprehensive Student Charges	14-15
Overview of Student Fees	16
Narrative Description of Mandatory Fees	17

**UNIVERSITY OF MAINE SYSTEM
FY25 TOTAL STUDENT CHARGES**

	Annual Tuition	Mandatory Fees	Tuition & Mandatory Fees ¹	Room & Board ²	Total
<u>I. Undergraduate</u>					
In-State & Canadian					
UM	\$12,360	\$966	\$13,326	\$13,160	\$26,486
UMM	8,970	1,080	10,050	11,148	21,198
UMA	7,800	1,088	8,888	8,803	17,691
UMF	9,180	2,128	11,308	12,678	23,986
UMFK	7,800	1,605	9,405	9,590	18,995
UMPI	7,800	1,556	9,356	10,710	20,066
USM	9,180	2,910	12,090	12,121	24,211
Average	9,013	1,619	10,632	11,568	22,200
Out-of-State					
UM	\$35,790	\$966	\$36,756	\$13,160	\$49,916
UMM	17,460	1,080	18,540	11,148	29,688
UMA	21,090	1,088	22,178	8,803	30,981
UMF	21,750	2,128	23,878	12,678	36,556
UMFK	13,260	1,605	14,865	9,590	24,455
UMPI	13,260	1,556	14,816	10,710	25,526
USM	27,030	2,910	29,940	12,121	42,061
Average	21,377	1,619	22,996	11,568	34,564
NEBHE					
UM	\$21,630	\$966	\$22,596	\$13,160	\$35,756
UMM	15,690	1,080	16,770	11,148	27,918
UMA	13,260	1,088	14,348	8,803	23,151
UMF	16,080	2,128	18,208	12,678	30,886
UMFK	13,260	1,605	14,865	9,590	24,455
UMPI	13,260	1,556	14,816	10,710	25,526
USM	16,080	2,910	18,990	12,121	31,111
Average	15,609	1,619	17,228	11,568	28,796

¹Annual tuition & mandatory fees are based on 15 credit hours per semester for two semesters for undergraduate and law students and 9 credit hours per semester for two semesters for graduate students.

²Rates shown are based on the meal plan and room type with the greatest projected number of students. Several meal plans and room types are available. Beginning in FY20, UMA has limited housing but no dining. UMA added meal plans in FY25.

**UNIVERSITY OF MAINE SYSTEM
FY25 TOTAL STUDENT CHARGES**

	Annual Tuition	Mandatory Fees	Tuition & Mandatory Fees ¹	Room & Board ²	Total
II. Graduate					
In-State & Canadian					
UM	\$10,026	\$636	\$10,662	\$13,160	\$23,822
UMA	8,244	653	8,897	8,803	17,700
UMF	8,154	568	8,722	12,678	21,400
USM	8,262	1,656	9,918	12,121	22,039
Average	8,672	878	9,550	12,653	22,203
Out-of-State					
UM	\$30,528	\$636	\$31,164	\$13,160	\$44,324
UMA	10,890	653	11,543	8,803	20,346
UMF	8,154	568	8,722	12,678	21,400
USM	25,020	1,656	26,676	12,121	38,797
Average	18,648	878	19,526	12,653	32,179
NEBHE					
UM	\$17,550	\$636	\$18,186	\$13,160	\$31,346
UMA	14,022	653	14,675	8,803	23,478
USM	14,040	1,656	15,696	12,121	27,817
Average	15,204	982	16,186	12,641	28,827

III. Law School³

In-State/Canadian - Cont. 3L	\$23,190	\$2,160	\$25,350	\$12,121	\$37,471
In-State/Canadian - Cont. 2L	\$23,880	\$2,160	\$26,040	\$12,121	\$38,161
In-State/Canadian - New	\$24,600	\$2,160	\$26,760	\$12,121	\$38,881
Out-of-State	\$36,000	\$2,160	\$38,160	\$12,121	\$50,281
NEBHE	\$31,650	\$2,160	\$33,810	\$12,121	\$45,931

¹Annual tuition & mandatory fees are based on 15 credit hours per semester for two semesters for undergraduate and law students and 9 credit hours per semester for two semesters for graduate students.

²Rates shown are based on the meal plan and room type with the greatest projected number of students. Several meal plans and room types are available. Beginning in FY20, UMA has limited housing but no dining. UMA added meal plans in FY25.

UNIVERSITY OF MAINE SYSTEM
FY25 TUITION RATES - PER CREDIT HOUR

	FY24 Rate	FY25 Rate	FY25 Increases	
			\$	%
In-State				
Undergraduate				
UM	\$400	\$412	12	3.0
UMM	290	299	9	3.1
UMA/UMFK/UMPI	252	260	8	3.2
UMF/USM	297	306	9	3.0
Graduate				
UM	557	557	-	-
UMA	445	458	13	2.9
UMF	440	453	13	3.0
USM	445	459	14	3.1
Law - Continuing Students 3L	773	773	-	-
Law - Continuing Students 2L	796	796	-	-
Law - New Students		820	24	3.0
Out-of-State				
Undergraduate				
UM	1,158	1,193	35	3.0
UMM	565	582	17	3.0
UMA	683	703	20	2.9
UMF	700	725	25	3.6
UMFK/UMPI	428	442	14	3.3
USM	875	901	26	3.0
Graduate				
UM	1,696	1,696	-	-
UMA	587	605	18	3.1
UMF	440	453	13	3.0
USM	1,350	1,390	40	3.0
Law	1,200	1,200	-	-

UNIVERSITY OF MAINE SYSTEM
FY25 TUITION RATES - PER CREDIT HOUR

	FY24 Rate	FY25 Rate	FY25 Increases	
			\$	%
NEBHE				
Undergraduate				
UM	\$700	\$721	21	3.0
UMM	508	523	15	3.0
UMA/UMFK/UMPI	428	442	14	3.3
UMF	504	536	32	6.3
USM	505	536	31	6.1
Graduate				
UM	975	975	-	
UMA	757	779	22	2.9
USM	757	780	23	3.0
Law	1,055	1,055	-	-
Canadian				
Undergraduate				
UM	400	412	12	3.0
UMM	290	299	9	3.1
UMA/UMFK/UMPI	252	260	8	3.2
UMF	297	306	9	3.0
USM	297	306	9	3.0
Graduate				
UM	557	557	-	-
UMA	445	458	13	2.9
UMF	440	453	13	3.0
USM	445	459	14	3.1
Law - Continuing Students 3L	773	773	-	-
Law - Continuing Students 2L	796	796	-	-
Law - New Students		820	24	3.0

**UNIVERSITY OF MAINE SYSTEM
ANNUAL TUITION RATES**

UNDERGRADUATE			FY24 to FY25	
			Annual Increase	
<u>In-State & Canadian</u>	<u>FY24</u>	<u>FY25</u>	<u>\$</u>	<u>%</u>
UM	\$12,000	\$12,360	360	3.0
UMM	8,700	8,970	270	3.1
UMA	7,560	7,800	240	3.2
UMF	8,910	9,180	270	3.0
UMFK	7,560	7,800	240	3.2
UMPI	7,560	7,800	240	3.2
USM	8,910	9,180	270	3.0
Average	8,743	9,013	270	3.1
<u>Out-of-State</u>				
UM	\$34,740	\$35,790	1,050	3.0
UMM	16,950	17,460	510	3.0
UMA	20,490	21,090	600	2.9
UMF	21,000	21,750	750	3.6
UMFK	12,840	13,260	420	3.3
UMPI	12,840	13,260	420	3.3
USM	26,250	27,030	780	3.0
Average	20,730	21,377	647	3.1
<u>NEBHE</u>				
UM	\$21,000	\$21,630	630	3.0
UMM	15,240	15,690	450	3.0
UMA	12,840	13,260	420	3.3
UMF	15,120	16,080	960	6.3
UMFK	12,840	13,260	420	3.3
UMPI	12,840	13,260	420	3.3
USM	15,150	16,080	930	6.1
Average	15,004	15,609	605	4.0

NOTE: Based on 15 credit hours per semester for two semesters for undergraduate and law students and 9 credit hours per semester for two semesters for graduate students. In FY24, UMF changed curriculum from 16 credit hours per semester to 15 credit hours per semester.

5.1

**UNIVERSITY OF MAINE SYSTEM
ANNUAL TUITION RATES**

GRADUATE			FY24 to FY25	
			Annual Increase	
<u>In-State & Canadian</u>	FY24	FY25	\$	%
UM	\$10,026	\$10,026	-	-
UMA	8,010	8,244	234	2.9
UMF	7,920	8,154	234	3.0
USM	8,010	8,262	252	3.1
Average	8,492	8,672	180	2.1
<u>Out-of-State</u>				
UM	\$30,528	\$30,528	-	-
UMA	10,566	10,890	324	3.1
UMF	7,920	8,154	234	3.0
USM	24,300	25,020	720	3.0
Average	18,329	18,648	319	1.7
<u>NEBHE</u>				
UM	\$17,550	\$17,550	-	-
UMA	13,626	14,022	396	2.9
USM	13,626	14,040	414	3.0
Average	14,934	15,204	270	1.8
LAW				
<u>In-State/Canadian - Continuing 3</u>	\$23,190	\$23,190	-	-
<u>In-State/Canadian - Continuing 2</u>	23,880	23,880	-	-
<u>In-State/Canadian - New Students</u>		24,600	720	3.0
<u>Out-of-State</u>	36,000	36,000	-	-
<u>NEBHE</u>	31,650	31,650	-	-

NOTE: Based on 15 credit hours per semester for two semesters for undergraduate and law students and 9 credit hours per semester for two semesters for graduate students. In FY24, UMF changed curriculum from 16 credit hours per semester to 15 credit hours per semester.

5.1

**UNIVERSITY OF MAINE SYSTEM
DIFFERENTIAL TUITION RATES**

5.1

Campus	Program/Modality		FY24 Rate	FY25 Rate	Unit	Change	
						\$	%
UMaine	MBS Business School	Graduate program	679	750	CH	71	10.5
	Res'd Online		400	400	CH	0	0.0
	NR Online (e-rate)		500	500	CH	0	0.0
	Graduate (Grad Asst)		*	557	CH		
	Graduate On line	MBA	679	750	CH	71	10.5
		Engineering	732	732	CH	0	0.0
		Education	567	567	CH	0	0.0
		All Other	608	608	CH	0	0.0
	Grad Differential Tuition	Engineering	335	335	Semester	0	0.0
		Nursing	397	397	Semester	0	0.0

UMA	Dental Health (DEH)	Elim Course fee	853	1,060	CH	207	24.3
	Dental Assisting (DEA)	Elim Course fee	353	410	CH	57	16.1
	Expanded Function Dental	Elim Course fee	252	410	CH	158	62.7
	Computer Info Systems (CIS)	Elim Course fee	252	285	CH	33	13.1
	Data Science (DSC)	Elim Course fee	252	285	CH	33	13.1
	Cybersecurity (CYB)	Elim Course fee	252	315	CH	63	25.0
	Information Systems (ISS)	Elim Course fee	252	315	CH	63	25.0
	Architecture (ARC)	Elim Course fee	439	470	CH	31	7.1
	Non Res'd UG On Line		329	390	CH	61	18.5

UMFK	Undergrad-Flat Rate	RN BSN	309	318	CH-no fees	9	2.9
	Graduate Online-Flat Rate	MSN and DNP	500	500	CH-no fees	0	0.0

UMPI	YourPace	Undergraduate	1,500	1,700	Session	200	13.3
		Graduate	2,150	2,350	Session	200	9.3

USM	Non Res'd UG On Line		486	343	CH	(143)	(29.4)
	NR GR e-rate		729	509	CH	(220)	(30.2)
	BS Nursing	In-State	306	0	CH	(306)	(100.0)
		Out-of-State	901	0	CH	(901)	(100.0)
	Accelerated Nursing	In-State	306	0	CH	(306)	(100.0)
		Out-of-State	901	0	CH	(901)	(100.0)
	Differential 2	UG In-State/Canadian	-	325	CH	325	-
	Differential 2	UG NEBHE	-	569	CH	569	-
	Differential 2	UG Out of State	-	956	CH	956	-
	Differential 3	UG In-State/Canadian	-	343	CH	343	-
	Differential 3	UG NEBHE	-	600	CH	600	-
	Differential 3	UG Out of State	-	1,010	CH	1,010	-
	Differential 2	G In-State/Canadian	-	486	CH	486	-
	Differential 2	G NEBHE	-	851	CH	851	-
	Differential 2	G Out of State	-	1,474	CH	1,474	-
	Differential 3	G In-State/Canadian	-	515	CH	515	-
	Differential 3	G NEBHE	-	901	CH	901	-
	Differential 3	G Out of State	-	1,557	CH	1,557	-

* Prior to FY25, Grad Assistant rates were based on residency; beginning in FY25, all Grad Assistants pay a single rate.

UNIVERSITY OF MAINE SYSTEM
ANNUAL MANDATORY FEES¹

5.1

University	Fee	Credit Hours	FY24	FY25	\$ Increase
UM	Graduate Student Activity Fee	1 to 5 Credit Hours	\$120.00	\$120.00	-
		6 or More Credit Hours	150.00	150.00	-
	Infrastructure & Technology Fee	Per Credit Hour	15.00	27.00	12.00
	Undergraduate Student Activity Fee (Includes former Communication Fee \$30)	6 or More Credit Hours	156.00	156.00	-
UMM	Student Activity Fee	Per Credit Hour	\$9.00	\$9.00	-
	Infrastructure & Technology Fee	Per Credit Hour	15.00	27.00	12.00
UMA	Student Activity Fee	Per Credit Hour, up to 15 per Term	\$2.25	\$2.25	-
		16 or More Credit Hours	67.50	67.50	-
	Unified Fee	Per Credit Hour	33.00	34.00	1.00
UMF	Academic Support Fee (Formerly Unified Fee)	6 or less Credit Hours	\$189.00	\$194.00	5.00
		7 to 11 Credit Hours	377.00	388.00	11.00
		12 or More Credit Hours	740.00	762.00	22.00
	Technology Fee	Per Credit Hour	10.00	10.00	-
	Undergraduate Student Activity Fee	1 to 5 1/2 Credit Hours	\$80.00	\$80.00	-
		6 to 11 1/2 Credit Hours	120.00	120.00	-
		12 or More Credit Hours	160.00	160.00	-
	Undergraduate Student Support Fee	6 or less Credit Hours	259.00	266.00	7.00
		7 to 11 Credit Hours	517.00	532.00	15.00
		12 or More Credit Hours	879.00	906.00	27.00
UMFK	Student Activity Fee	Per Credit Hour	\$7.50	\$7.50	-
	Technology Fee	Per Credit Hour	10.00	12.00	2.00
	Unified Fee	Per Credit Hour	32.00	34.00	2.00
UMPI	Student Activity Fee	6 or less Credit Hours	\$85.00	\$88.00	3.00
		7 or More Credit Hours	170.00	176.00	6.00
	Technology Fee	Per Credit Hour	10.00	12.00	2.00
	Unified Fee - Campus	Per Credit Hour	32.00	34.00	2.00
USM	Comprehensive Fee	Per Credit Hour	80.00	83.00	3.00
	Technology Fee	Per Credit Hour	8.00	9.00	1.00
	Undergraduate Student Activity Fee	Per Credit Hour	5.00	5.00	-
Law School	Comprehensive Fee	Per Credit Hour	\$45.00	\$60.00	15.00
	Law Student Activity Fee	6 or More Credit Hours	150.00	150.00	-
	Technology Fee	Per Credit Hour	7.00	7.00	-

¹ Annual unless listed as per credit hour.

UNIVERSITY OF MAINE SYSTEM

ANNUAL MANDATORY FEES

<u>Undergraduate</u>		<u>FY24</u>	<u>FY25</u>	<u>FY25 Increases</u>	
				<u>\$</u>	<u>%</u>
UM	Student Activity	\$156	\$156		
	Infrastructure & Technology Fee	450	810		
	Total	\$606	\$966	360	59.4
UMM	Student Activity	\$270	\$270		
	Infrastructure & Technology Fee	450	810		
	Total	\$720	\$1,080	360	50.0
UMA	Student Activity	\$68	\$68		
	Unified Fee	990	1,020		
	Total	\$1,058	\$1,088	30	2.8
UMF	Academic Support Fee (formerly Unified Fee)	\$740	\$762		
	Student Activity	160	160		
	Student Support Fee	879	906		
	Technology Fee	300	300		
	Total	\$2,079	\$2,128	49	2.4
UMFK	Student Activity	\$225	\$225		
	Technology Fee	300	360		
	Unified Fee	960	1,020		
	Total	\$1,485	\$1,605	120	8.1
UMPI	Student Activity	\$170	\$176		
	Technology Fee	300	360		
	Unified Fee - Campus	960	1,020		
	Total	\$1,430	\$1,556	126	8.8
USM	Comprehensive Fee	\$2,400	\$2,490		
	Student Activity	150	150		
	Technology Fee	240	270		
	Total	\$2,790	\$2,910	120	4.3
Average		\$1,453	\$1,619	166	11.4

NOTE: Based on 15 credit hours per semester for two semesters for undergraduate and law students and 9 credit hours per semester for two semesters for graduate students. In FY24, UMF changed curriculum from 16 credit hours per semester to 15 credit hours per semester.

UNIVERSITY OF MAINE SYSTEM
ANNUAL MANDATORY FEES

				FY25 Increases	
<u>Graduate</u>		<u>FY24</u>	<u>FY25</u>	<u>\$</u>	<u>%</u>
UM	Infrastructure & Technology Fee	\$270	\$486		
	Student Activity	150	150		
	Total	\$420	\$636	216	51.4
UMA	Student Activity	\$41	\$41		
	Unified Fee	594	612		
	Total	\$635	\$653	18	2.8
UMF	Technology Fee	\$180	\$180		
	Academic Support Fee (Formerly Unified Fee)	377	388		
	Total	\$557	\$568	11	2.0
USM	Comprehensive Fee	\$1,440	\$1,494		
	Technology Fee	144	162		
	Total	\$1,584	\$1,656	72	4.5
Average		\$799	\$878	79	9.9
<u>Law</u>					
	Comprehensive Fee	\$1,350	\$1,800		
	Student Activity	150	150		
	Technology Fee	210	210		
Average		\$1,710	\$2,160	450	26.3

NOTE: Based on 15 credit hours per semester for two semesters for undergraduate and law students and 9 credit hours per semester for two semesters for graduate students. In FY24, UMF changed curriculum from 16 credit hours per semester to 15 credit hours per semester.

5.1

UNIVERSITY OF MAINE SYSTEM
ANNUAL TUITION AND MANDATORY FEES

UNDERGRADUATE	FY24	FY25	FY25 Increases	
			\$	%
<u>In-State & Canadian</u>	<u>Rate</u>	<u>Rate</u>		
UM	\$12,606	\$13,326	720	5.7
UMM	9,420	10,050	630	6.7
UMA	8,618	8,888	270	3.1
UMF	10,989	11,308	319	2.9
UMFK	9,045	9,405	360	4.0
UMPI	8,990	9,356	366	4.1
USM	11,700	12,090	390	3.3
Average	10,196	10,632	436	4.3
<u>Out-of-State</u>				
UM	\$35,346	\$36,756	1,410	4.0
UMM	17,670	18,540	870	4.9
UMA	21,548	22,178	630	2.9
UMF	23,079	23,878	799	3.5
UMFK	14,325	14,865	540	3.8
UMPI	14,270	14,816	546	3.8
USM	29,040	29,940	900	3.1
Average	22,183	22,996	813	3.7
<u>NEBHE</u>				
UM	\$21,606	\$22,596	990	4.6
UMM	15,960	16,770	810	5.1
UMA	13,898	14,348	450	3.2
UMF	17,199	18,208	1,009	5.9
UMFK	14,325	14,865	540	3.8
UMPI	14,270	14,816	546	3.8
USM	17,940	18,990	1,050	5.9
Average	16,457	17,228	771	4.7

5.1

UNIVERSITY OF MAINE SYSTEM
ANNUAL TUITION AND MANDATORY FEES

GRADUATE	FY24	FY25	FY25 Increases	
			\$	%
<u>In-State & Canadian</u>	<u>Rate</u>	<u>Rate</u>		
UM	\$10,446	\$10,662	216	2.1
UMA	8,645	8,897	252	2.9
UMF	8,477	8,722	245	2.9
USM	9,594	9,918	324	3.4
Average	9,291	9,550	259	2.8
<u>Out-of-State</u>				
UM	\$30,948	\$31,164	216	0.7
UMA	11,201	11,543	342	3.1
UMF	8,477	8,722	245	2.9
USM	25,884	26,676	792	3.1
Average	19,128	19,526	398	2.1
<u>NEBHE</u>				
UM	\$17,970	\$18,186	216	1.2
UMA	14,261	14,675	414	2.9
USM	15,210	15,696	486	3.2
Average	15,814	16,186	372	2.4
LAW				
In-State/Canadian - Cont. 3	\$24,900	\$25,350	450	1.8
In-State/Canadian - Cont. 2	25,590	26,040	450	1.8
In-State/Canadian New		26,760	1,170	4.5
Out-of-State	37,710	38,160	450	1.2
NEBHE	33,360	33,810	450	1.3

5.1

**UNIVERSITY OF MAINE SYSTEM
ANNUAL ROOM & BOARD CHARGES¹**

	ROOM CHARGES		FY25 Increases	
	FY24	FY25	\$	%
UM	\$6,320	\$6,670	350	5.5
UMM	4,890	4,890	-	-
UMF ²	6,950	7,090	140	2.0
UMFK	5,140	5,140	-	-
UMPI	5,300	5,460	160	3.0
USM	6,130	6,380	250	4.1
Average	5,788	5,938	150	2.6
UMA	7,914	8,152		
	BOARD CHARGES			
	FY24	FY25		
UM	\$6,076	\$6,490	414	6.8
UMM	5,960	6,258	298	5.0
UMF	5,360	5,588	228	4.3
UMFK	4,450	4,450	-	-
UMPI	5,000	5,250	250	5.0
USM	5,520	5,741	221	4.0
Average	5,394	5,630	236	4.4
UMA		651		
	TOTAL			
	FY24	FY25		
UM	\$12,396	\$13,160	764	6.2
UMM	10,850	11,148	298	2.7
UMF	12,310	12,678	368	3.0
UMFK	9,590	9,590	-	-
UMPI	10,300	10,710	410	4.0
USM	11,650	12,121	471	4.0
Average	11,182	11,568	386	3.5

¹Rates shown are based on the meal plan and room type with the greatest projected number of students. Several meal plans and room types are available. Beginning in FY20, UMA has limited housing but no dining. UMA added meal plans in FY25.

²UMF FY24 room rate has been restated from the double to the single rate for accurate comparison with FY25 rates.

UNIVERSITY OF MAINE SYSTEM
ANNUAL COMPREHENSIVE STUDENT CHARGES
(Includes Tuition, Mandatory Fees, Room and Board)

UNDERGRADUATE	FY24	FY25	FY25 Increases	
	Rate	Rate	\$	%
<u>In-State & Canadian</u>				
UM	\$25,002	\$26,486	1,484	5.9
UMM	20,270	21,198	928	4.6
UMA	16,532	17,691	1,159	7.0
UMF	23,299	23,986	687	2.9
UMFK	18,635	18,995	360	1.9
UMPI	19,290	20,066	776	4.0
USM	23,350	24,211	861	3.7
Average	21,379	22,200	821	3.8
<u>Out-of-State</u>				
UM	\$47,742	\$49,916	2,174	4.6
UMM	28,520	29,688	1,168	4.1
UMA	29,462	30,981	1,519	5.2
UMF	35,389	36,556	1,167	3.3
UMFK	23,915	24,455	540	2.3
UMPI	24,570	25,526	956	3.9
USM	40,690	42,061	1,371	3.4
Average	33,366	34,564	1,198	3.6
<u>NEBHE</u>				
UM	\$34,002	\$35,756	1,754	5.2
UMM	26,810	27,918	1,108	4.1
UMA	21,812	23,151	1,339	6.1
UMF	29,509	30,886	1,377	4.7
UMFK	23,915	24,455	540	2.3
UMPI	24,570	25,526	956	3.9
USM	29,590	31,111	1,521	5.1
Average	27,640	28,796	1,156	4.2

NOTE: Tuition and Fees based on 15 credit hours per semester for two semesters for undergraduate and law students and 9 credit hours per semester for two semesters for graduate students. In FY24, UMF changed curriculum from 16 credit hours per semester to 15 credit hours per semester. Room and board rates are based on the meal plan and room type with the greatest projected number of students. Several meal plans and room types are available. Beginning in FY20, UMA has limited housing but no dining. UMA added meal plans in FY25. UMF FY24 room rate has been restated from double to single for accurate comparison to FY25 rates.

5.1

UNIVERSITY OF MAINE SYSTEM
ANNUAL COMPREHENSIVE STUDENT CHARGES
(Includes Tuition, Mandatory Fees, Room and Board)

GRADUATE	FY24	FY25	FY25 Increases	
			\$	%
<u>In-State & Canadian</u>	<u>Rate</u>	<u>Rate</u>		
UM	\$22,842	\$23,822	980	4.3
UMA	16,559	17,700	1,141	6.9
UMF	20,787	21,400	613	2.9
USM	21,244	22,039	795	3.7
Average	21,410	22,203	793	3.7
<u>Out-of-State</u>				
UM	\$43,344	\$44,324	980	2.3
UMA	19,115	20,346	1,231	6.4
UMF	20,787	21,400	613	2.9
USM	37,534	38,797	1,263	3.4
Average	31,247	32,179	932	3.0
<u>NEBHE</u>				
UM	\$30,366	\$31,346	980	3.2
UMA	22,175	23,478	1,303	5.9
USM	26,860	27,817	957	3.6
Average	27,837	28,827	990	3.6
LAW				
In-State/Canadian - Cont. 3	\$36,550	\$37,471	921	2.5
In-State/Canadian - Cont. 2	\$37,240	\$38,161	921	2.5
In-State/Canadian New		\$38,881	\$1,641	4.4
Out-of-State	\$49,360	\$50,281	921	1.9
NEBHE	\$45,010	\$45,931	921	2.0

NOTE: Tuition and Fees based on 15 credit hours per semester for two semesters for undergraduate and law students and 9 credit hours per semester for two semesters for graduate students. In FY24, UMF changed curriculum from 16 credit hours per semester to 15 credit hours per semester. Room and board rates are based on the meal plan and room type with the greatest projected number of students. Several meal plans and room types are available. Beginning in FY20, UMA has limited housing but no dining. UMA added meal plans in FY25. UMF FY24 room rate has been restated from double to single for accurate comparison to FY25.

UNIVERSITY OF MAINE SYSTEM STUDENT FEES

OVERVIEW

The procedures for establishing student fees throughout the University of Maine System are contained in the Board of Trustees Policy Manual in Section 703 and 704 as follows:

5.1

The **BOARD OF TRUSTEES** will establish those fees that are analogous to tuition, i.e., those that must be paid by all students as a condition of attendance. In addition, changes to the amount of the Student Activity Fee shall be requested by the recognized student governing body at each University and authorized after (a) a referendum approved by the student body, (b) approval of the President and, (c) approval of the Chancellor for presentation and approval by the Board of Trustees. Board approved fees include the Comprehensive Fee, Student Activity Fee, Student Health & Wellness Fee, Technology Fee and Unified Fee.

The **CHANCELLOR** will establish those fees impacting services and operations within the System. These include maximum levels for financial service fees (non-negotiable check fees) and fees principally affecting prospective students, such as application fees.

The **UNIVERSITY PRESIDENTS** are responsible to the maximum extent possible for establishing most university-specific fees, which include:

- all course fees
- all deposits
- all fees for optional university services and activities

Fee changes planned for the fall semester should ordinarily be adopted no later than May; those to become effective in the spring semester should be adopted by November 15. Universities should establish procedures for timely review of and comment on fee changes. The Chancellor should be informed in advance of the formal adoption of any fee changes.

Adjustments to Student Activity Fees will be considered by the Board at its May meeting in order to allow sufficient time for student governments to conduct spring referendums on any changes recommended to the fees.

**UNIVERSITY OF MAINE SYSTEM
NARRATIVE DESCRIPTION OF EACH MANDATORY FEE**

<u>Fee Name</u>	<u>University Charging Fee</u>
<u>Comprehensive Fee</u> This fee covers fixed costs of providing educational and student services not already supported by tuition.	USM
<u>Infrastructure & Technology Fee</u> This fee provides funding for campus technology, infrastructure, and the physical environment that supports access to student services and opportunities for academic achievement and success, as well as enhanced engagement and an improved, overall student experience.	UM/UMM
<u>Student Activity Fee</u> A student approved mandatory fee that is administered by the students for educational, cultural, social, and recreational purposes. Changes to this fee require the approval of the student body, University President, Chancellor, and Board of Trustees.	All
<u>Technology Fee</u> This fee supports the campus technology and educational environment necessary to meet the technological demands of the University of Maine community.	UMF/UMFK/UMPI/USM
<u>Unified Fee</u> This fee is used to cover fixed costs of providing educational services that may not be directly related to the number of credit hours for which a student is enrolled. This fee supports activities such as student services, the operation of facilities such as student and fitness centers, and student-utilized, instruction-related technologies.	UMA/UMF/UMFK/UMPI

University of Maine System
Board of Trustees

AGENDA ITEM SUMMARY

6

NAME OF ITEM: Finance and Administration Update

INITIATED BY: Dannel P. Malloy, Chancellor

BOARD INFORMATION: X

BOARD ACTION:

BOARD POLICY:

UNIFIED ACCREDITATION CONNECTION:

Primary Outcomes - Enhance fiscal positioning.

BACKGROUND:

The Vice Chancellor for Finance and Administration and Treasurer Ryan Low will provide 2 brief updates at the May 19-20, 2024, Board of Trustees meeting.

- 1) Investment Update – Flash reports
- 2) Current Fiscal Year-to-Date Forecast to Budget

Attachments

[Attachment 2024 03 UMAINE MIP Flash](#)

[Attachment 2024 03 UMAINE Operating Flash](#)

[Attachment 2024 03 UMAINE Pension Flash](#)

Attachments

Managed Investment Pool Flash Reports

Pension Fund Flash Reports

Operating Fund Flash Reports

University of Maine System Managed Investment Pool

March 31, 2024

TOTAL PLAN PERFORMANCE

	Allocation			Performance (%)							
	Market Value (\$)	% of Portfolio	Policy (%)	1 Mo (%)	3 Mo (%)	FYTD (%)	1 Yr (%)	3 Yrs (%)	5 Yrs (%)	7 Yrs (%)	10 Yrs (%)
MIP Composite	396,593,777	100.0	100.0	2.2	5.2	10.8	14.7	4.1	7.2	6.5	5.4
Allocation Index				2.2	5.3	11.7	16.1	5.0	8.0	7.4	6.3
Policy Index				2.2	5.4	11.7	16.0	4.8	7.8	7.5	6.4
Total Domestic Large Cap	96,088,945	24.2	25.0	3.1	10.4	19.8	30.4	11.6	15.1	14.1	12.9
S&P 500 Index				3.2	10.6	19.4	29.9	11.5	15.0	14.1	13.0
SSgA Fossil Fuel Free S&P 500 Index	96,088,945	24.2	25.0	3.1	10.4	19.6	30.4	-	-	-	-
S&P 500 Fossil Fuel Free Index				3.1	10.5	19.6	30.5	-	-	-	-
Total Domestic Small/Mid Cap	20,731,418	5.2	5.0	3.8	8.0	16.8	21.6	6.7	13.2	11.5	9.8
Russell 2500 Index				4.1	6.9	15.4	21.4	3.0	9.9	9.4	8.8
Westfield Capital	10,423,759	2.6	2.5	2.3	11.5	15.1	19.5	3.7	12.3	12.4	10.1
Russell 2500 Growth Index				2.7	8.5	13.8	21.1	-0.8	9.4	10.6	9.6
DFA	10,307,659	2.6	2.5	5.3	4.6	18.3	23.7	9.7	13.2	9.8	8.8
Russell 2000 Value Index				4.4	2.9	15.1	18.8	2.2	8.2	6.6	6.9
Global Equity	40,898,714	10.3	10.0	1.8	7.4	11.4	17.8	7.3	-	-	-
MSCI World Index (Net)				3.2	8.9	17.1	25.1	8.6	-	-	-
Walter Scott Global Equity	40,898,714	10.3	10.0	1.8	7.4	11.4	17.8	7.3	-	-	-
MSCI World Index (Net)				3.2	8.9	17.1	25.1	8.6	-	-	-
Total International Equity (including emerging markets)	74,311,785	18.7	19.0	2.1	3.7	9.0	11.9	-1.5	3.4	3.4	2.5
MSCI AC World ex USA (Net)				3.1	4.7	10.6	13.3	1.9	6.0	5.9	4.3
Silchester International Value Equity	19,944,916	5.0	5.0	3.5	1.7	10.8	13.9	-	-	-	-
MSCI EAFE (Net)				3.3	5.8	12.0	15.3	-	-	-	-
JO Hambro	20,921,893	5.3	5.0	2.1	8.4	13.4	19.0	-1.4	-	-	-
MSCI EAFE (Net)				3.3	5.8	12.0	15.3	4.8	-	-	-
Axiom International Small Cap Equity	8,125,215	2.0	2.0	2.1	6.6	9.8	8.7	-	-	-	-
MSCI EAFE Small Cap (Net)				3.7	2.4	9.8	10.4	-	-	-	-

6.1



University of Maine System Managed Investment Pool

TOTAL PLAN PERFORMANCE

March 31, 2024

	Allocation			Performance (%)							
	Market Value (\$)	% of Portfolio	Policy (%)	1 Mo (%)	3 Mo (%)	FYTD (%)	1 Yr (%)	3 Yrs (%)	5 Yrs (%)	7 Yrs (%)	10 Yrs (%)
Emerging Markets Equity	25,319,760	6.4	7.0	1.1	0.9	4.0	6.4	-3.2	4.3	3.8	2.6
Emerging Markets Equity Custom Benchmark				1.3	1.7	10.3	14.3	-0.4	5.4	6.0	4.5
Aberdeen Emerging Mkts	18,038,533	4.5	5.0	2.5	1.7	3.1	2.9	-9.3	1.1	2.2	2.0
MSCI Emerging Markets (Net)				2.5	2.4	7.2	8.2	-5.1	2.2	3.7	2.9
Mondrian EM Small Cap	7,281,227	1.8	2.0	-2.0	-1.0	5.7	13.9	4.1	7.9	5.6	-
MSCI Emerging Markets Small Cap				0.1	1.1	13.3	20.6	4.2	8.5	6.6	-
Total Fixed Income	104,470,177	26.3	26.5	0.8	0.3	4.3	4.5	0.2	2.3	2.5	2.5
Blmbg. U.S. Aggregate Index				0.9	-0.8	2.6	1.7	-2.5	0.4	1.1	1.5
Commonfund	25,754,729	6.5	6.5	0.8	-0.4	2.6	2.1	-2.4	0.5	1.3	1.8
Blmbg. U.S. Aggregate Index				0.9	-0.8	2.6	1.7	-2.5	0.4	1.1	1.5
Fidelity Intermediate Treasury Bond Index (FUAMX)	19,773,615	5.0	5.0	0.7	-1.0	1.5	-	-	-	-	-
Blmbg. U.S. Treasury Index				0.6	-1.0	1.4	-	-	-	-	-
Vanguard Inflation-Protected Securities	19,753,493	5.0	5.0	0.7	-0.1	1.8	0.2	-0.7	2.4	2.2	-
Blmbg. U.S. TIPS				0.8	-0.1	1.9	0.5	-0.5	2.5	2.3	-
Blackrock Strategic Income Opportunities	19,556,571	4.9	5.0	1.0	0.9	6.1	6.7	1.0	3.1	-	-
Libor 3 month Index				0.5	1.4	4.3	5.6	3.2	2.4	-	-
Bain Capital Senior Loan Fund	19,631,769	5.0	5.0	0.9	2.6	9.2	12.6	5.6	5.5	-	-
Credit Suisse Leveraged Loan Index				0.8	2.5	9.0	12.4	5.8	5.3	-	-
Total GAA	29,975,685	7.6	7.5	3.0	5.2	9.7	8.6	1.5	3.0	3.1	2.5
40% Bloomberg Agg/30% MSCI ACWI/30% ICE BoA 91-day T-Bills*				1.4	2.5	7.0	9.0	2.1	4.5	5.1	4.6
Newton Global Real Return	29,975,685	7.6	7.5	3.0	5.2	9.7	8.6	1.5	4.5	4.3	-
40% Bloomberg Agg/30% MSCI ACWI/30% ICE BoA 91-day T-Bills				1.4	2.5	7.0	9.0	2.1	4.3	4.3	-
Total Hedge Funds	27,722,157	7.0	7.0	2.5	4.0	6.0	8.0	3.5	8.2	6.3	4.4
HFRI Fund of Funds Composite Index				1.6	4.2	8.0	9.7	2.9	5.0	4.4	3.6
Lighthouse	27,722,157	7.0	7.0	2.5	4.0	6.0	8.0	3.5	8.2	6.6	-
Credit Suisse Long/Short Equity				1.2	6.7	11.6	13.8	5.7	6.8	6.2	-

6.1



University of Maine System Managed Investment Pool

March 31, 2024

TOTAL PLAN PERFORMANCE

	Allocation			Performance (%)							
	Market Value (\$)	% of Portfolio	Policy (%)	1 Mo (%)	3 Mo (%)	FYTD (%)	1 Yr (%)	3 Yrs (%)	5 Yrs (%)	7 Yrs (%)	10 Yrs (%)
Private Equity	936,531	0.2	0.0	0.0	0.0	-1.8	-2.6	-2.8	4.5	6.5	-
Landmark Equity Partners XV	936,531	0.2	0.0	0.0	0.0	-1.8	-2.6	-2.8	4.5	6.5	-
CJA US All PE (1 Qtr Lag)				2.9	2.9	6.1	8.9	14.5	15.7	15.2	-
Total Cash	1,458,365	0.4	0.0								
Distribution Account	1,458,365	0.4	0.0	0.1	0.6	2.3	3.7	2.1	1.5	1.5	1.0
90 Day U.S. Treasury Bill				0.4	1.3	4.0	5.2	2.6	2.0	1.9	1.4

Notes:

Fiscal YTD begins 7/1

Blended Index: 40% Bloomberg Aggregate, 30% Bloomberg U.S. TIPS 1-10YR, 10% S&P 500, 10% Bloomberg High Yield, 10% JPM EMBI+

Emerging Markets Equity Custom Benchmark consists of MSCI EM from Inception to 5/31/2019 and 50% MSCI EM / 50% MSCI EM Small Cap from 6/1/2019 to present.

Returns are net of manager fees

In Sept 2021, the benchmark for Newton Global Real Return changed to 40% Bloomberg Agg/30% MSCI ACWI/30% ICE BoA 91- day T-Bills.

6.1



DISCLAIMERS & DISCLOSURES

Past performance is no guarantee of future results.

Returns for pooled funds, e.g. mutual funds and collective investment trusts, are collected from third parties; they are not generally calculated by NEPC. Returns for separate accounts, with some exceptions, are calculated by NEPC. Returns are reported net of manager fees unless otherwise noted.

A “since inception” return, if reported, begins with the first full month after funding, although actual inception dates (e.g. the middle of a month) and the timing of cash flows are taken into account in Composite return calculations.

NEPC’s preferred data source is the plan’s custodian bank or record-keeper. If data cannot be obtained from one of the preferred data sources, data provided by investment managers may be used. Information on market indices and security characteristics is received from additional providers. While NEPC has exercised reasonable professional care in preparing this report, we cannot guarantee the accuracy of all source information contained within. In addition, some index returns displayed in this report or used in calculation of a policy index, allocation index or other custom benchmark may be preliminary and subject to change.

All investments carry some level of risk. Diversification and other asset allocation techniques are not guaranteed to ensure profit or protect against losses.

The opinions presented herein represent the good faith views of NEPC as of the date of this presentation and are subject to change at any time. Neither fund performance nor universe rankings contained in this report should be considered a recommendation by NEPC.

This report may contain confidential or proprietary information and may not be copied or redistributed to any party not legally entitled to receive it.

Source of private fund performance benchmark data: Cambridge Associates, via Refinitiv





University of Maine System Operating Fund

March 31, 2024

TOTAL FUND PERFORMANCE

	Allocation			Performance (%)							
	Market Value (\$)	% of Portfolio	Policy(%)	1 Mo (%)	3 Mo (%)	FYTD (%)	1 Yr (%)	3 Yrs (%)	5 Yrs (%)	7 Yrs (%)	10 Yrs (%)
Operating Funds Composite	276,801,388	100.0	100.0	1.1	2.0	6.4	7.7	2.6	4.0	3.6	3.0
<i>Allocation Index</i>				0.9	2.0	6.3	7.7	2.7	3.5	3.3	2.9
Liquidity Pool Composite	76,723,061	27.7	30.0	0.4	1.1	3.4	4.5	2.3	1.9	1.8	1.3
State Pool	41,022,804	14.8		0.4	0.9	3.0	3.8	2.0	1.8	1.7	1.3
BOA General Fund	1,635,599	0.6		0.2	0.4	1.4	1.9	1.2	0.9	0.8	0.6
Federated Gov't Obligations	995,110	0.4		0.4	1.3	4.4	6.3	3.0	2.2	2.0	-
JP Morgan US Gov't Money Market Fund	33,069,548	11.9		0.4	1.3	3.9	5.3	2.8	2.0	1.9	-
<i>90 Day U.S. Treasury Bill</i>				0.4	1.3	4.0	5.2	2.6	2.0	1.9	-
Income Pool Composite	131,669,870	47.6	47.5	0.7	0.8	5.1	5.5	0.8	2.2	2.1	2.0
Income Research + Management	71,936,224	26.0	26.0	0.5	0.7	4.3	4.4	0.7	2.0	1.9	1.6
<i>Blmbg. 1-3 Year Gov/Credit index</i>				0.4	0.4	3.9	3.5	0.2	1.4	1.4	1.3
BlackRock Strategic Income Opportunities	19,145,857	6.9	7.0	1.0	0.9	6.1	6.7	1.0	3.1	3.0	-
<i>Libor 3 month Index</i>				0.5	1.4	4.3	5.6	3.2	2.4	2.3	-
Baird Aggregate Bond Fund - BAGIX	20,826,248	7.5	7.5	1.0	-0.5	3.4	2.8	-2.2	-	-	-
<i>Blmbg. U.S. Aggregate Index</i>				0.9	-0.8	2.6	1.7	-2.5	-	-	-
Bain Senior Floating Rate Fund	19,761,540	7.1	7.0	0.9	2.6	9.2	12.6	-	-	-	-
<i>Credit Suisse Leveraged Loan Index</i>				0.8	2.5	9.0	12.4	-	-	-	-
Total Return Pool Composite	68,408,458	24.7	22.5	2.8	5.6	11.6	15.2	5.1	8.7	7.7	6.2
Lighthouse	13,678,824	4.9	5.0	2.5	4.0	6.0	8.0	3.5	8.2	6.6	-
<i>Credit Suisse Long/Short Equity</i>				1.2	6.7	11.6	13.8	5.7	6.8	6.2	-
Newton Global Real Return	12,768,550	4.6	4.0	3.0	5.2	9.7	8.6	1.5	4.5	4.3	-
<i>40% Bloomberg Agg/30% MSCI ACWI/30% ICE BoA 91-day T-Bills</i>				1.4	2.5	7.0	9.0	2.1	4.3	4.3	-
PIMCO All Asset	13,213,410	4.8	4.0	1.8	2.0	6.5	7.3	2.2	5.5	5.1	4.3
<i>PIMCO All Asset Index III</i>				1.5	1.0	5.0	5.2	0.8	3.6	3.5	2.8
Silchester International Value Equity	9,596,870	3.5	3.3	3.5	1.7	10.8	13.9	-	-	-	-
<i>MSCI EAFE (Net)</i>				3.3	5.8	12.0	15.3	-	-	-	-
SSgA Fossil Fuel Free S&P 500 Index	19,150,804	6.9	6.2	3.1	10.5	19.6	30.4	-	-	-	-
<i>S&P 500 Fossil Fuel Free Index</i>				3.1	10.5	19.6	30.5	-	-	-	-

6.2

University of Maine System Operating Fund

TOTAL FUND PERFORMANCE

March 31, 2024

Notes:

Returns are net of manager fees.

The inception date for the allocation index is 07/01/2009

Fiscal YTD begins 7/1

Blended Index: 40% Bloomberg Aggregate / 30% Bloomberg U.S. TIPS 1-10YR / 10% S&P 500 / 10% Bloomberg High Yield / 10% JPM EMBI+
Composite excludes external loans.

Blackrock SIO changed its share class in May 2018 to BSIKX.

In Sept 2021, the benchmark for Newton Global Real Return changed to 40% Bloomberg Agg/30% MSCI ACWI/30% ICE BoA 91- day T-Bills.

Bain account reflects a \$4m contribution which was in transit as of March 31, 2024

6.2



DISCLAIMERS & DISCLOSURES

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All investments carry some level of risk. Diversification and other asset allocation techniques are not guaranteed to ensure profit or protect against losses.

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This report may contain confidential or proprietary information and may not be copied or redistributed to any party not legally entitled to receive it.

Source of private fund performance benchmark data: Cambridge Associates, via Refinitiv





University of Maine System Pension Plan

March 31, 2024

TOTAL FUND PERFORMANCE

	Allocation			Performance (%)							
	Market Value (\$)	% of Portfolio	Policy (%)	1 Mo (%)	3 Mo (%)	FYTD (%)	1 Yr (%)	3 Yrs (%)	5 Yrs (%)	7 Yrs (%)	10 Yrs (%)
Pension Composite	18,357,964	100.0	100.0	1.2	2.7	6.1	8.0	2.9	5.5	5.2	4.5
Allocation Index				1.4	3.0	7.5	10.0	3.6	5.8	5.7	5.1
Policy Index				1.5	3.1	8.0	10.4	3.7	5.9	5.8	5.3
Total Global Equity	5,515,733	30.0	30.0	1.8	7.5	12.3	19.0	7.8	-	-	-
MSCI World Index (Net)				3.2	8.9	17.1	25.1	8.6	-	-	-
Walter Scott Global Equity Fund	5,515,733	30.0	30.0	1.8	7.5	12.3	19.0	7.8	-	-	-
MSCI World Index (Net)				3.2	8.9	17.1	25.1	8.6	-	-	-
Emerging Markets Equity	542,184	3.0	3.0	-2.0	-1.0	5.7	13.9	4.1	7.9	5.6	3.4
Emerging Markets Equity Benchmark				0.1	1.1	13.3	20.6	4.2	8.4	8.1	6.0
Mondrian EM Small Cap	542,184	3.0	3.0	-2.0	-1.0	5.7	13.9	4.1	7.9	5.6	-
MSCI Emerging Markets Small Cap				0.1	1.1	13.3	20.6	4.2	8.5	6.6	-
Total Fixed Income	8,012,128	43.6	48.0	0.9	0.1	4.2	4.0	-0.7	1.6	2.0	2.1
Blmbg. U.S. Aggregate Index				0.9	-0.8	2.6	1.7	-2.5	0.4	1.1	1.5
Baird Aggregate Bond Fund - BAGIX	4,556,415	24.8	25.0	1.0	-0.5	3.4	2.8	-2.2	-	-	-
Blmbg. U.S. Aggregate Index				0.9	-0.8	2.6	1.7	-2.5	-	-	-
Fidelity Intermediate Treasury Bond Index (FUAMX)	849,790	4.6	5.0	0.7	-1.0	1.5	-	-	-	-	-
Blmbg. U.S. Treasury Index				0.6	-1.0	1.4	-	-	-	-	-
Vanguard Inflation-Protected Securities	671,848	3.7	8.0	0.7	-0.2	1.8	0.2	-0.7	2.4	-	-
Blmbg. U.S. TIPS				0.8	-0.1	1.9	0.5	-0.5	2.5	-	-
BlackRock Strategic Income Opportunities	883,371	4.8	5.0	1.0	0.9	6.1	6.7	1.0	3.1	-	-
Libor 3 month Index				0.5	1.4	4.3	5.6	3.2	2.4	-	-
Bain Capital Senior Loan Fund	1,050,704	5.7	5.0	0.9	2.6	9.2	12.6	5.6	5.5	-	-
Credit Suisse Leveraged Loan Index				0.8	2.5	9.0	12.4	5.8	5.3	-	-
Total GAA	1,564,450	8.5	8.0	3.0	5.2	9.7	8.6	1.5	4.7	4.3	3.2
40% Bloomberg Agg/30% MSCI ACWI/30% ICE BoA 91-day T-Bills*				1.4	2.5	7.0	9.0	2.1	4.5	5.1	4.6
Newton Global Real Return	1,564,450	8.5	8.0	3.0	5.2	9.7	8.6	1.5	4.5	4.3	-
40% Bloomberg Agg/30% MSCI ACWI/30% ICE BoA 91-day T-Bills				1.4	2.5	7.0	9.0	2.1	4.3	4.3	-

6.3



University of Maine System Pension Plan

March 31, 2024

TOTAL FUND PERFORMANCE

	Allocation			Performance (%)							
	Market Value (\$)	% of Portfolio	Policy (%)	1 Mo (%)	3 Mo (%)	FYTD (%)	1 Yr (%)	3 Yrs (%)	5 Yrs (%)	7 Yrs (%)	10 Yrs (%)
Total Alternative Investments	755,288	4.1	5.0	2.5	4.0	6.0	8.0	3.5	8.2	6.3	4.7
<i>HFRI Fund of Funds Composite Index</i>				1.6	4.2	8.0	9.7	2.9	5.0	4.4	3.6
Lighthouse	755,288	4.1	5.0	2.5	4.0	6.0	8.0	3.5	8.2	6.6	-
<i>Credit Suisse Long/Short Equity</i>				1.2	6.7	11.6	13.8	5.7	6.8	6.2	-
Total Real Assets	1,414,059	7.7	3.0								
Principal	1,414,059	7.7	3.0	-1.2	-2.0	-8.2	-9.9	2.7	3.0	4.4	6.5
<i>NCREIF ODCE</i>				-2.4	-2.4	-8.8	-11.3	3.4	3.5	4.7	6.8
Total Cash	554,122	3.0	3.0								
Distribution Account	554,122	3.0	3.0	0.6	1.2	3.3	4.3	2.1	1.5	1.5	1.0
<i>90 Day U.S. Treasury Bill</i>				0.4	1.3	4.0	5.2	2.6	2.0	1.9	1.4

Notes:

Fiscal YTD begins 7/1

Blended Index: 40% Bloomberg Aggregate, 30% Bloomberg U.S. TIPS 1-10YR, 10% S&P 500, 10% Bloomberg High Yield, 10% JPM EMBI+ Emerging Markets Equity Benchmark consists of MSCI EM from inception to 5/31/2019 and MSCI EM Small Cap from 6/1/2019 to present.

Returns are net of manager fees.

In Sept 2021, the benchmark for Newton Global Real Return changed to 40% Bloomberg Agg/30% MSCI ACWI/30% ICE BoA 91- day T-Bills.

6.3



DISCLAIMERS & DISCLOSURES

Past performance is no guarantee of future results.

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Source of private fund performance benchmark data: Cambridge Associates, via Refinitiv





University of Maine System
Board of Trustees

AGENDA ITEM SUMMARY

NAME OF ITEM: Energy Savings Performance Contract (ESPC) Financing, Project and Reimbursement Resolution Authorization, UM

7

CAMPUS PRESENTER(S): Tracy Elliott, VP for Finance and Controller

INITIATED BY: Dannel P. Malloy, Chancellor

BOARD INFORMATION:

BOARD ACTION: X

BOARD POLICY:

701 – Budgets, Operating & Capital

712 – Debt Policy

UNIFIED ACCREDITATION CONNECTION:

As the primary hub of research activity for Maine's public universities, the University of Maine campus in Orono provides learning, research, and scholarship opportunities for faculty, students, and staff across the University of Maine System. The state of its infrastructure and the energy consumption of lighting across campus buildings and grounds play a significant impact on their ability to provide these opportunities in a cost-effective and environmentally sustainable manner. Modern LED lighting fixtures will improve the environmental quality of their indoor spaces, conserve energy, and reduce related expenditures on facilities important to the UMS mission.

UMS STRATEGIC PLAN CONNECTION:

UMS Strategic Plan Commitment 2, Action 3 states that "UMS will partner with the universities and law school to identify and implement by spring 2024 new operational efficiencies leading to cost reductions for each institution in the System." Specifically, this project works towards addressing aging facilities through the lens of efficiency and modernization through energy-efficient and modern light fixtures. Using tax-exempt debt financing will be the most efficient way to fund this project.

This project also aims to satisfy Goal 3.3 of the UMS Strategic Plan, which is to "identify reductions in energy consumption, including strategic management of underused or unused buildings and offices during periods of peak energy consumption (winter and summer)." With an estimated reduction of approximately 1.3 million kWh per year, UM expects a significant reduction in energy consumption and a corresponding cost reduction, depending on the market and contract rates for energy.

This aligns with UMaine's carbon reduction strategy. UMaine is a signatory of the Carbon Commitment, which is focused on reducing Greenhouse Gas emissions and achieving carbon neutrality as soon as possible. By signing The Carbon Commitment, UMaine agreed to develop a

Climate Action Plan to achieve carbon neutrality. This involves conducting a Greenhouse Gas emissions inventory and implementing steps to reduce greenhouse gas emissions.

BACKGROUND:

At its January 29, 2024 meeting, the Board of Trustees authorized the University of Maine System (UMS), acting through the University of Maine, to spend up to \$2,300,000 to pursue an energy savings performance contract (“ESPC”) to save energy, reduce costs, reduce carbon emissions, and improve the indoor environmental quality of campus space. Honeywell’s study of “demand side” lighting opportunities define this project which includes replacing approximately 6,088 lights with energy-saving LED lights in approximately 61 buildings on the Orono campus. While the number of lights to be replaced may vary based on the energy efficiency rebates available at the time the Energy Services Company (ESCO) contract is signed, UM will move forward with projects that both reduce energy consumption and have a return on investment.

When the Board approved this project in January, it was with the understanding that final terms and conditions of the financing would be approved by the Vice Chancellor for Finance & Administration and Treasurer. This resolution is to approve the use of tax-exempt financing, which UM will repay primarily through the reduction in use of and charges for electricity, which Honeywell has estimated to be more than \$350,000 annually. Actual savings will depend on avoided energy consumption, and market/contract rates for energy.

The Finance, Facilities and Technology Committee approved this item to be forwarded to the May 19th/20th, 2024 Board of Trustees meeting, for approval of the following resolution:

TEXT OF PROPOSED RESOLUTION:

That the Board of Trustees accepts the recommendation of the Finance, Facilities, and Technology Committee, and approves the Financing, ESPC, Project and Reimbursement of Project Expenditures resolution to authorize the University of Maine System, acting through the University of Maine, to fund an ESPC project implementing Energy Conservation Measures related to approximately 61 campus buildings with a project total of up to \$2,300,000, using financing with a maximum principal amount of debt of \$2,300,000.

Attachments

[01.29.2024 UM Energy Savings Lighting Project](#)

[Resolution - Financing, ESPC and Project Authorization and Reimbursement Resolution](#)

University of Maine System
Board of Trustees

AGENDA ITEM SUMMARY

NAME OF ITEM: Energy Savings Lighting Project, UM

CAMPUS PRESENTER(S): Joan Ferrini-Mundy, President; Kelly Sparks, Vice President for Finance and Administration & Chief Business Officer

INITIATED BY: Dannel P. Malloy, Chancellor

BOARD INFORMATION:

BOARD ACTION: X

BOARD POLICY:

701 – Budgets, Operating & Capital
712 – Debt Policy

UNIFIED ACCREDITATION CONNECTION:

As the primary hub of research activity for Maine's public universities, the University of Maine campus in Orono provides learning, research, and scholarship opportunities for faculty, students, and staff across the University of Maine System. The state of our infrastructure and the energy consumption of lighting across campus buildings and grounds play a significant impact on our ability to provide these opportunities in a cost-effective and environmentally sustainable manner. Modern LED lighting fixtures will improve the environmental quality of our indoor spaces, conserve energy, and reduce related expenditures on facilities important to the UMS mission.

UMS STRATEGIC PLAN CONNECTION:

UMS Strategic Plan Commitment 2, Action 3 states that "UMS will partner with the universities and law school to identify and implement by spring 2024 new operational efficiencies leading to cost reductions for each institution in the System." Specifically, this project works towards addressing aging facilities through the lens of efficiency and modernization through energy-efficient and modern light fixtures.

This project also aims to satisfy Goal 3.3 of the UMS Strategic Plan, which is to "identify reductions in energy consumption, including strategic management of underused or unused buildings and offices during periods of peak energy consumption (winter and summer)." With an estimated reduction of approximately 1.3 million kWh per year, we expect a significant reduction in energy consumption and a corresponding cost reduction, depending on the market and contract rates for energy.

This aligns with UMaine's carbon reduction strategy. UMaine is a signatory of the Carbon Commitment, which is focused on reducing Greenhouse Gas emissions and achieving carbon neutrality as soon as possible. By signing The Carbon Commitment, UMaine agreed to develop a Climate Action Plan to achieve carbon neutrality. This involves conducting a Greenhouse Gas

1/18/24

7.1

emissions inventory and implementing steps to reduce greenhouse gas emissions.

BACKGROUND:

a. Summary of the request

The University of Maine System, acting through the University of Maine, requests authorization to spend up to \$2.3 million to pursue an energy savings performance contract (“ESPC”) to save energy, reduce costs, reduce carbon emissions, and improve the indoor environmental quality of campus space.

This request is pursuant to Board policy 701, which requires Board approval for projects with a value of \$500,000 or greater. Also, Board Policy 712 applies as it states that UMS “will consider off-balance sheet financing (e.g., public/private partnerships) when it is desirable to work with a third party, for risk sharing, and for leasing.”

b. Overall requested budget and funding source(s):

The budget of \$2.3 million includes replacing nearly 6,000 lights with energy-saving LED lights in approximately 60 campus buildings. The number of lights to be replaced may vary, up or down, based on this requested budget and the energy efficiency rebates available at the time the ESCO contract is signed.

The project will use 3rd party financing, which will be repaid primarily through the reduction in use and demand charges of electricity.

c. Is the project included or reflected in the Master Plan, Long Term capital plan or 1-year capital plan most recently approved by Trustees?

This project is identified in the 1-year capital plan most recently approved by the Trustees.

d. Detailed explanation of rationale for project and metrics for success of the project (ROI or other)

The project is expected to reduce energy use by approximately 1.3 million kWh per year. At current market rates, which would be an estimated annual savings of more than \$350,000. The actual savings will depend not only on the actual avoided energy consumption but also on changes in the market and contract rates for energy.

e. Explanation of the scope and substance of the project as needed to supplement (a) through (d) above. Note: scope includes an explanation of community impact, how the project ties to the University’s mission, etc.

UMaine has been working with Honeywell to pursue demand-side opportunities within the campus grounds and building infrastructure that promise many expected benefits, including: improving the indoor environmental quality of the learning environment, conserving energy and increasing efficiencies, reducing the university's environmental impact, reducing energy and utility costs, and renewal of critical utility infrastructure throughout the campus and within campus buildings that are essential to fulfillment of the university's mission.

f. Changes, if any, in net square footage or ongoing operating costs resulting from the project

1/18/24

This project will not change any net square footage. The university anticipates reduced operating costs from the installation of modern LED light fixtures.

g. Alternatives that were considered to meet the need being addressed by this project

The alternatives assessed included a study done by Honeywell of “demand side” lighting opportunities across the campus. We are suggesting projects to move forward that both reduce energy consumption and have a return on investment.

h. Project Timeline for: 1. Start 2. Occupancy and 3. Completion

Upon Board approval, the university will seek to execute financing and contracts for the work with Honeywell. The work could commence in the spring of 2024 and is expected to last approximately 12 months in duration.

i. Timeline for any further consideration or action anticipated to be needed by the Board or its committees regarding this project if full authority is not being requested from the outset.

The university does not anticipate any further consideration or action needed by the Board or its committees.

j. Additional information that may be useful to consideration of the item.

N/A

The Finance, Facilities and Technology Committee approved this item to be forwarded to the January 28/29, 2024 Board of Trustees meeting, for approval of the following resolution:

TEXT OF PROPOSED RESOLUTION:

That the Board of Trustees accepts the recommendation of the Finance, Facilities, and Technology Committee, and authorizes The University of Maine System, acting through the University of Maine, to spend up to \$2.3 million to pursue an energy savings performance contract (“ESPC”) to save energy, reduce costs, reduce carbon emissions, and improve the indoor environmental quality of campus space. Final terms and conditions of the financing to be approved by the Vice Chancellor for Finance & Administration and Treasurer.

Resolution

FINANCING, ESPC AND PROJECT AUTHORIZATION

WHEREAS, the Board of Trustees (the “Board”) of the University of Maine System (the “System”) desires to authorize the System, acting through the University of Maine (“UM”), to execute and implement an Energy Savings Performance Contract (“ESPC”) with UM’s Energy Service Company, Honeywell (the “ESCO”), to provide for a comprehensive package of energy conservation measures (“ECMs”) at the UM Orono campus, to save energy, reduce energy and operational costs, reduce carbon emissions, and improve the learning environment for students in a manner that is structured as cost neutral, as more particularly described in the Agenda Item Summary to which this financing resolution is attached, which is incorporated herein by reference (the “Projects”); and

WHEREAS, the Board desires to authorize the System to enter into a financing/lease transaction (the “Financing”), with a provider to be selected through an ongoing Request for Proposal process (the “Lender”) to finance the Projects and to provide for any necessary capitalized interest, reserves and costs of issuance; and

WHEREAS, the System is authorized to enter into the Financing pursuant to the provisions of 20-A MRSA §§10952, 10953 and 10955 and other provisions of the Maine Revised Statutes Annotated, Chapters 411 and 412, as amended (the “Act”); and

WHEREAS, the Board finds that the financing of all or a portion of the costs of the Projects with proceeds of the Financing constitutes an “assured revenue financing transaction” pursuant to the provisions of 20-A MRSA §10953, as amended; and

WHEREAS, pursuant to 20-A MRSA §10952(8), as amended, the System, as authorized by the Board, is authorized to make, enter into, execute, deliver and amend any and all contracts, agreements, leases, instruments and documents and perform all acts and do all things necessary or convenient to acquire, construct, reconstruct, improve, equip, finance, maintain and operate projects and to carry out the powers granted pursuant to the Act, or reasonably implied from those powers;

NOW, THEREFORE, be it hereby voted and resolved by the Board as follows:

RESOLVED, That the System is authorized to execute and implement an ESPC with the ESCO for the Projects, and the Treasurer of the System (the “Treasurer”) is hereby authorized and empowered from time to time and on behalf of the System to execute and deliver such documents and agreements, including but not limited to the ESPC and an Energy Service Assessment (“ESA”), as the Treasurer may deem necessary or convenient or desirable in connection therewith. Such agreements, documents and instruments may (a) contain such terms and provisions, not contrary to the general tenor hereof, as the Treasurer may approve, his approval to be conclusively evidenced by his execution thereof, (b) be delivered under the seal of the System and (c) be attested by the System’s Clerk or General Counsel; and further;

RESOLVED, That pursuant to the provisions of 20-A MRSA §§10952, 10953 and 10955, as amended, and all other authority thereto enabling, and to provide funds for (a) the planning, design, acquisition, construction, reconstruction, improvement, renovation, rehabilitation and equipping of the Projects, (b) any capitalized interest on, reserves for and costs of issuance in connection with the Financing and (c) any other purpose authorized by law, the Treasurer is hereby authorized and empowered from time to time and in the name and on behalf of the System to borrow an aggregate amount not to exceed \$2,300,000, and the Treasurer be and is hereby authorized and empowered, in the name of and on behalf of the System, to execute and deliver such lease/purchase agreements, addendum thereto, escrow or restricted account agreements, investment agreements, financial advisory agreements, investment advisory agreements, agreements with bond counsel and other agreements, documents and instruments as the Treasurer may deem necessary or convenient or desirable with respect to such borrowing. Such agreements, documents and instruments may (a) contain such terms and provisions, not contrary to the general tenor hereof, as the Treasurer may approve, his approval to be conclusively evidenced by his execution thereof, (b) be delivered under the seal of the System and (c) be attested by the System's Clerk or General Counsel; and further

RESOLVED, That pursuant to the provisions of 20-A MRSA §10955(3), as amended, and all other authority thereto enabling, and to provide funds for the purposes approved above, the Board hereby approves and authorizes, as evidence of the borrowing approved above, the execution and delivery of the Financing in the aggregate principal amount not to exceed \$2,300,000 with the Lender approved by the Treasurer upon completion of the Request for Proposal process; the Financing to mature and be payable at such times and in such amounts, to bear interest at such rate(s), which may be taxable or tax-exempt or a combination thereof, and to contain such other terms and provisions, not inconsistent herewith, as may be approved by the Treasurer; the Financing and all related documents to be signed by the Treasurer, and to be in such form and contain such other terms and provisions as the Treasurer may approve, his approval to be conclusively evidenced by his execution thereof; and further

RESOLVED, That the Treasurer or the Vice President & Controller, or any one of them, be and hereby are, authorized on behalf of the System, from time to time, to acquire, purchase, sell, redeem, liquidate, terminate or transfer securities or other instruments constituting investments of the proceeds of the Financing and to negotiate, enter into, execute in the name of the System and deliver on behalf of the System all investment, banking, brokerage, financial advisory, investment advisory and other agreements and instruments as are necessary or convenient to investment and financial management of the proceeds of the Bonds, all on such terms and conditions as such authorized officer shall determine are necessary or convenient for financing of the Projects, such determination to be conclusively evidenced by execution or acquisition of such agreements and instruments by such authorized officer; and further

RESOLVED, That the Chancellor of the System, the Treasurer, and, with the express written approval of the Treasurer, the Clerk, the Controller, the General Counsel, or the Chief Business Officer of UM (with respect to the ESPC and ESA only), or any one of them, be and hereby are, authorized and empowered in its name and on its behalf, to do or cause to be done any act or thing, and to negotiate, enter into, execute in the name of the System or UM, as applicable, deliver on behalf of the System or UM, as applicable, assign, transfer, modify or terminate any agreement or instrument, which any such officer may determine to be necessary or convenient or desirable with respect to the ESPC and the Financing, the planning, design, acquisition, construction, reconstruction, improvement, renovation, rehabilitation and equipping of the Projects and the expenditure, investment and management of the proceeds of the Financing and that all acts and things done by the Treasurer in furtherance of the purposes of this Resolution prior to the date hereof are hereby ratified and confirmed; and further

RESOLVED, That the carrying out of the Projects is hereby approved; and further

RESOLVED, The System covenants that it will, so long as the Financing is outstanding, establish, impose and collect tuition, fees and charges for its educational services, its auxiliary enterprises, including dormitory housing, food service and sale of textbooks, for use of its plant and for all other services and goods provided by the System, which tuition, fees and charges, together with other available moneys, in each fiscal year of the System, will be sufficient to permit the performance of all the covenants in, and requirements of the System under, the Financing, including the prompt payment of all payments on the Financing as and when due, the prompt payment of principal of and interest on all outstanding System bonds as and when due and the prompt payment and performance of all other obligations as and when due; and further

RESOLVED, That the Financing shall be secured by such assignments, pledges or commitments of funds or revenues, other than appropriations from the State of Maine, as may be approved by the Treasurer; and further

RESOLVED, That the Treasurer be and is hereby authorized to covenant on behalf of the System and for the benefit of the Lender that, except as hereafter authorized in this Resolution and in accordance with 20-A MRSA §10952(10), the System will take whatever steps, and refrain from taking any action, that may be necessary or appropriate to assure that the interest component of the payments on the Financing will remain exempt from federal and applicable state income taxes, as applicable; and further

RESOLVED, That the Treasurer be and is hereby authorized in accordance with 20-A MRSA §10952(10) to agree and consent to the inclusion of the interest component of the payments on the Financing, under the United States Internal Revenue Code of 1986 or any subsequent corresponding internal revenue law of the United States, in the gross income of the Lender to the same extent and in the same manner that the interest on bills, bonds, notes or other obligations of the United States is

includable in the gross income of the holders of such bills, bonds, notes or other obligations under the United States Internal Revenue Code or any such subsequent law; and further

This Resolution shall take effect immediately.

ADOPTED: May 20, 2024

ADDENDUM

RESOLUTION OF THE TRUSTEES OF THE UNIVERSITY OF MAINE SYSTEM

REIMBURSEMENT OF PROJECT EXPENDITURES

Be it resolved that, for purposes of U.S. Treasury Regulation §1.150-2, the University of Maine System reasonably expects (1) to incur debt to reimburse expenditures (including expenditures made within the last 60 days) temporarily advanced from University resources, such expenditures to be made to pay the cost, or a portion of the cost, of planning, design, acquisition, construction, reconstruction, improvement, renovation, rehabilitation and equipping of the projects described below (the “Projects”) and (2) that the maximum principal amount of debt to be issued by the University of Maine System for the Projects including for reimbursement purposes is Two Million Three Hundred Thousand Dollars (\$2,300,000).

PROJECT**University of Maine (Orono Campus):**

Construction and installation of lighting and lighting control upgrades including replacing approximately 6,088 lights with energy-saving LED lights in approximately 61 campus buildings at the University of Maine, as identified by an Energy Services Company to include construction work, labor, materials, equipment, and services.

This Resolution shall take effect immediately.

ADOPTED: May 20, 2024

University of Maine System
Board of Trustees

AGENDA ITEM SUMMARY

NAME OF ITEM: Vice Chancellor for Academic and Student Affairs update

INITIATED BY: Dannel P. Malloy, Chancellor

BOARD INFORMATION: X

BOARD ACTION:

BOARD POLICY: N/A

UNIFIED ACCREDITATION CONNECTION:

The University of Maine System's new Adult Degree Completion (ADC) initiatives are advancing UMS Strategic Plan goals in a context of innovation and collaboration. This presentation will apprise the Board of initial progress in the following areas of the Plan:

Commitment 1, Action 3: UMS will be the statewide leader in adult degree completion, credentialing, industry certifications, and licensure preparation.

Commitment 1, Action 3, Goal 3.1: UMS will deliver degree completion, credentialing, and certification programs that achieve national recognition for their innovative delivery methods and accelerated rates of success and completion.

BACKGROUND:

Vice Chancellor for Academic and Student Affairs Jeff St. John will share an update with the Board and answer questions.

Attachment

[VCASA BOT Slides May 2024](#)



Adult Degree Completion Update

8.1

Jeffrey St. John
Vice Chancellor for Academic and
Student Affairs
Board of Trustees
May 2024



Staffing and Development

- New staff members have been hired at UM/UMM, UMF, UMA, and USM to lead adult degree completion (ADC) recruitment, admissions, marketing, and related efforts
- Searches are underway for ADC staff positions at UMA and UMFK
- USM recently sent 19 professional staff members to an intensive training on adult learner recruitment, marketing, pedagogy, and support services
- These investments reflect national best practices in ADC: adult learners enroll, persist, and succeed at universities that offer a human point of contact

8.1



Marketing

Our universities have invested in a range of initiatives tailored to their ADC goals:

8.1

- Radio ads (UM/UMM)
- Postcard mailings (UMF, UM/UMM)
- Digital advertising (UMFK, USM, UMA, UM/UMM)
 - Google, YouTube, Facebook, Instagram, geofencing
- Blaze media marketing campaign (UMF)
- Email campaigns [Fall 2023] (UMA, UM/UMM, UMFK)
- Updated web presence (all)



Academic Enhancements and Incentives

These are a few examples of academic steps made in support of ADC efforts:

- Online, asynchronous, short-format course (e.g. 7-week courses) to meet adult learners' needs (UM, UMF)
- Online B.A. in Special Education and paths to conditional teacher certification via the Professional Studies degree (UMF)
- Business Management ADC pathway (UMFK)
- Workforce partners textbook vouchers (UMA)
- YourPace LevelUp scholarships (UMPI)

8.1



Early Successes

Early wins: enrollment, retention, transfer, and student success

8.1

- New adult learner enrollment at UMF has nearly tripled (year over year)
- Adult learner services have helped USM retain a group of students who would not otherwise have persisted
- Growth in transfer applications appears to be at least partly tied to ADC initiatives (we are studying the effect of ADC initiatives on overall UMS transfer activity)
- Two success stories: Renee at UMF and Amina at UMA

University of Maine System
Board of Trustees

AGENDA ITEM SUMMARY

NAME OF ITEM: Tenure at Time of Hire, Associate Professor in the Department of Molecular and Biomedical Sciences, UM

INITIATED BY: Dannel P. Malloy, Chancellor

BOARD INFORMATION:

BOARD ACTION: X

BOARD POLICY:

Board Policy 310: Tenure

UNIFIED ACCREDITATION CONNECTION:

NA

BACKGROUND:

The University of Maine has requested that Dr. Gregory Cox be awarded tenure at the rank of Associate Professor in the Department of Molecular and Biomedical Sciences within the College of Earth, Life, and Health Sciences at the University of Maine, effective January 2, 2024, in accordance with Board of Trustee Policy 310. Dr. Cox's credentials have been reviewed by the faculty of the Department of Molecular and Biomedical Sciences at the University of Maine and received their full support.

The Academic and Student Affairs Committee forwards this item to the May 19-20, 2024 Board of Trustees meeting for approval of the following resolution:

TEXT OF PROPOSED RESOLUTION:

That the Board of Trustees accepts the recommendation of the Academic and Student Affairs Committee and approves tenure at time of hire, Associate Professor in the Department of Molecular and Biomedical Sciences with tenure to be effective January 2, 2024.

University of Maine System
Board of Trustees

AGENDA ITEM SUMMARY

NAME OF ITEM: Vice Chancellor for Strategic Initiatives (VCSI) Update

INITIATED BY: Dannel P. Malloy, Chancellor

BOARD INFORMATION: X

BOARD ACTION:

BOARD POLICY:

N/A

UNIFIED ACCREDITATION CONNECTION:

University of Maine System leadership is committed to fostering collaboration and synergy among its universities by seeking ways to help them share resources, streamline messaging, achieve greater efficiency, and maintain consistency in their operations.

BACKGROUND:

At the May 2024 Board of Trustees meeting, the Acting Vice Chancellor for Strategic Initiatives (VCSI) Carolyn Dorsey will offer an update on timely system-wide initiatives including the following items:

Strategic Plan Update:

Acting Vice Chancellor Carolyn Dorsey will update the Board of Trustees on the progress of developing and reviewing Key Performance Indicators with the Strategic Planning Committee and will briefly discuss next steps as they are continuing in development. VC Dorsey will also offer brief updates regarding Human Resources and Labor Relations.

University of Maine System
Board of Trustees

AGENDA ITEM SUMMARY

NAME OF ITEM: Approval of Collective Bargaining Agreement, Police/FOP

INITIATED BY: Dannel P. Malloy, Chancellor

BOARD INFORMATION:

BOARD ACTION: X

BOARD POLICY:

Section 407 Labor Relations

UNIFIED ACCREDITATION CONNECTION: N/A

BACKGROUND:

The Board of Trustees delegates responsibility for negotiating collective bargaining agreements to the Chancellor. The Chancellor reports tentative agreements to the Board for approval prior to executing the agreements.

The University has reached a tentative agreement with the Fraternal Order of Police, Lodge #100. The Board will be briefed on the terms of the Agreement at the meeting.

TEXT OF PROPOSED RESOLUTION:

That the Board of Trustees authorizes the Chancellor to execute the collective bargaining agreement with the Fraternal Order of Police, Lodge #100, upon notice that the agreement has been ratified by the union.

Attachment

[Tentative Agreement Summary FOP 5.10.24](#) - Confidential

University of Maine System
Board of Trustees

AGENDA ITEM SUMMARY

NAME OF ITEM: Nominations of Chair and Vice Chair for FY2025

INITIATED BY: Trustee David MacMahon; Nominating Committee

BOARD INFORMATION:

BOARD ACTION: X

BOARD POLICY:

103 Board of Trustees: Bylaws

UNIFIED ACCREDITATION CONNECTION:

N/A

BACKGROUND:

Chair and Vice Chair nominations from the Trustees are presented annually by the Nominating Committee for approval. In accordance with Board practice, the nominations are reviewed in Executive Session. Action will be taken in the public meeting. The committee received self nominations from the chair and vice chair to continue in their current positions. Two trustees independently nominated the current slate. The nominating committee noted that the by laws allow the chair to serve for no more than 4 consecutive terms. Therefore, Trustee Riley is eligible to serve as chair for FY 25.

TEXT OF PROPOSED RESOLUTION:

That the Board of Trustees approves the FY2025 nominations for Chair and Vice Chair as presented by the Nominating Committee.

University of Maine System
Board of Trustees

AGENDA ITEM SUMMARY

NAME OF ITEM: Confirmation of Student Representative to the Board of Trustees

INITIATED BY: Patricia A. Riley, Chair

BOARD INFORMATION:

BOARD ACTION: X

BOARD POLICY:

Policy 205 – Faculty & Student Representatives to the Board of Trustees

UNIFIED ACCREDITATION CONNECTION:

N/A

BACKGROUND:

To create the environment for interaction among and between Faculty and Student Representatives, the Trustees and System administration, the Trustees have provided opportunities for participation in the meetings of the committees of the Board.

One faculty member and one undergraduate student from each of the seven universities and one graduate student from the University of Southern Maine, one graduate student from the University of Maine, and one graduate student from the Maine Law School will be appointed by the Board as non-voting representatives to the Board of Trustees and invited to participate as non-voting members on the standing committees.

Normally, the representative is expected to complete a two-year term; therefore, it is an expectation that the minimum term of service by Faculty and Student Representatives to the Board be two years. The nominations will be forwarded through the Presidents or Dean of the Law School to the Chancellor for submission to the Board for Trustee approval.

The following nomination is being recommended by the campus:

Undergraduate Student Representative

Camille Alipalo, USM – Appointed for a 2-year term – May 2024 to May 2026

Tyler Davis, Law – Appointed for a 2-year term – May 2024 to May 2026

Grace Hills, UMA - Appointed for a 2-year term – May 2024 to May 2026

TEXT OF PROPOSED RESOLUTION:

That the Board of Trustees approves the appointment of the Student Representative to the Board of Trustees as presented.

University of Maine System
Board of Trustees

AGENDA ITEM SUMMARY

NAME OF ITEM: Acceptance of Minutes

INITIATED BY: Patricia A. Riley, Chair

BOARD INFORMATION:

BOARD ACTION: X

BOARD POLICY:

N/A

UNIFIED ACCREDITATION CONNECTION:

N/A

BACKGROUND:

The following minutes will be presented to the Board of Trustees for approval at the May 20, 2024, Board meeting:

February 28, 2024 – Investment Committee Meeting

March 20, 2024 – Finance, Facilities and Technology Committee Meeting

May 1, 2024 - Executive Committee Meeting

The Board of Trustees website link to the minutes is: <http://www.maine.edu/about-the-system/board-of-trustees/meeting-minutes/>

TEXT OF PROPOSED RESOLUTION:

That the Board of Trustees approves the minutes as presented.

University of Maine System
Board of Trustees

AGENDA ITEM SUMMARY

NAME OF ITEM: New Academic Proposal: Doctor of Engineering in Engineering Technology, University of Maine

INITIATED BY: Dannel P. Malloy, Chancellor

BOARD INFORMATION:

BOARD ACTION: X

BOARD POLICY:

305.1 Program Approval, Review & Elimination Procedures

UNIFIED ACCREDITATION CONNECTION:

As emphasized in the 2023-28 University of Maine System Strategic Plan, unified accreditation is "the mechanism through which our universities and law school are able to maximize resources and capitalize on opportunities for growth and collaboration."

The Academic and Student Affairs Committee of the Board ensures that every effort is made to operationalize unified accreditation in its review of proposed academic programs.

The Vice Chancellor for Academic and Student Affairs has actively explored multi-university collaboration(s) for this proposed academic program with the system-wide Chief Academic Officers Council. The proposed program

___ represents a multi-university collaboration in the following way(s):

___ may represent a future multi-university collaboration under the following condition(s) and in the following way(s):

X does not represent a multi-university collaboration for the following reason(s):

Within the University of Maine System, Engineering Technology programming is unique to the University of Maine. This does not preclude future collaborations appropriate to the subject and degree level.

If the proposed academic program fulfills/advances one or more actions or goals in the UMS Strategic Plan, please indicate by name which action(s) and/or goal(s) that is, and how the proposed program will fulfill or advance it/them:

This proposal meets and advances the goal articulated in the Strategic Plan's Commitment 2 (Effective Academic Portfolio Actions section), Action 1:

Develop innovative programs and curricula responsive to changing economic and workforce needs, data-driven projections of growth areas, and technological innovation.

BACKGROUND:

The UM Doctor of Engineering in Engineering Technology is designed for working professionals seeking advanced training in their field. This 100% online, part-time dissertation program combines research and applied learning, granting students the skills to serve in advanced leadership roles in survey engineering and related fields and qualifying them for postsecondary teaching roles. More than 25 letters of support from industry professionals were submitted in preparing this proposal. This program will fill a unique niche in doctoral education - although several institutions offer on-campus programs in Engineering Technology, no doctoral-level online programs are available in the United States. In addition, this new doctoral program will contribute to MCEC's Harold Alfond Foundation supported UMS TRANSFORMS' goal of doubling engineering and computing student enrollments by 2032.

The Academic and Student Affairs Committee forwards this item to the Consent Agenda at the May 19-20, 2024, Board of Trustees meeting for approval of the following resolution:

TEXT OF PROPOSED RESOLUTION:

That the Board of Trustees accepts the recommendation of the Academic and Student Affairs Committee, and approves the Doctor of Engineering in Engineering Technology at the University of Maine.

Attachment

[UM Doctor of Engineering in Engineering Technology](#)



UMS Academic and Student Affairs

Estabrooke Hall
Orono, Maine 04469
207-973-3211
www.maine.edu

Date: April 1, 2024

To: Dannel Malloy, Chancellor
University of Maine System (UMS)

From: Jeffrey St. John, VCASA } {

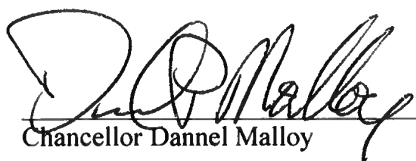
Regarding: New Program Addition, Doctor of Engineering in Engineering Technology with a concentration in Surveying Engineering Technology, UM

Please find the attached program proposal from the University of Maine to offer the Doctor of Engineering in Engineering Technology with a concentration in Surveying Engineering Technology. The attached material includes documentation of university level support including approval from President Ferrini-Mundy and the full program proposal.

The proposed addition of the Doctor of Engineering in Engineering Technology with a concentration in Surveying Engineering Technology was reviewed and recommended by the Chief Academic Officers Council on March 7, 2024. I also recommend this program for your approval.

15.1

I approve	I do not approve for the reasons listed below	Additional information needed for decision	Action
✓			Recommend the EngD Engineering Technology program at the University of Maine


Chancellor Dannel Malloy

4.2.24
Date

Maine's Public Universities

University of Maine • University of Maine at Augusta • University of Maine at Farmington
University of Maine at Fort Kent • University of Maine at Machias • University of Maine at Presque Isle
University of Maine School of Law • University of Southern Maine

Office of the Executive Vice President
for Academic Affairs & Provost



5703 Alumni Hall, Suite 201
Orono, Maine 04469-5703
Tel: 207.581.1547
Fax: 207.581.1633
umaine.edu

TO: Jeffrey St. John
Vice Chancellor for Academic & Student Affairs (UMS)

FROM: John C. Volin
Executive Vice President for Academic Affairs & Provost (UM/UMM)

SUBJECT: Doctor of Engineering (Eng.D.) in Engineering Technology with a
concentration in Surveying Engineering Technology

DATE: March 1, 2024

The University of Maine proposes a Doctor of Engineering (Eng.D.) in Engineering Technology with a concentration in Surveying Engineering Technology. The Intent to Plan was reviewed and approved by the CAOC in March, 2023, putting forth the full program proposal in Fall 2023. The Graduate Board reviewed and approved the full proposal on September 28, 2023. The Faculty Senate Program Creation and Reorganization Review Committee approved the program proposal in February, 2024, with the full Faculty Senate voting to pass the motion to approve on February 21, 2024.

Rationale

This proposed doctoral program can be completed 100% online and part-time to accommodate working professionals. The program requires a total of 42 credits beyond the bachelor's degree, of which 15 credits, including dissertation credits, are core requirements. The remaining 27 credits would be selected from a list of courses that would satisfy the Surveying Engineering Technology concentration. A combination of research-oriented and applied learning, graduates of this program will be able to translate their skills into either an academic or professional career.

Industry data reflect the need for college faculty in surveying engineering technology, with a growth of 52% over the decade. The need is further demonstrated by more than (25) letters of support from professionals advocating to the University of Maine that a doctorate, as proposed, is absolutely needed. This new and fully-online doctoral degree program will address the global market demand for masters level surveying engineering technology degrees (38 students currently at the University of Maine). Current and past masters students have included faculty at the University of Maine and other institutions where a doctoral degree would enhance their professional progress and in certain cases, are required for a tenure track position. It supports UMS TRANSFORMS goals and our R1 classification by increasing the availability of doctoral graduates at UMaine.

MAINE'S LAND GRANT, SEA GRANT AND SPACE GRANT UNIVERSITY
WITH A REGIONAL CAMPUS IN MACHIAS

15.1

There are no PhD/doctorate programs in the University of Maine System directly competing with this proposed program, the closest being the PhD in Spatial Information Science and Engineering, offered in-person, and does not include the term “surveying” in its description. No other personnel or operating expenses are expected for offering this program.

RECOMMENDED ACTION: This program has received all appropriate campus review and approval. I fully support and recommend the creation of the Doctor of Engineering in Engineering Technology with a Concentration in Surveying Engineering Technology within the College of Engineering and Computing at the University of Maine. Please let me know if you have any questions or if there is any additional information you require.

Approved By:



John C. Volin
Executive Vice President for Academic Affairs & Provost

March 1, 2024

Date

15.1

Attachment:

1. *Memo from Jeffrey St. John, VCASA*
Dated: March 21, 2023
Subject: Intent to Plan - Doctor of Engineering (Eng.D.) in Engineering Technology
2. *Proposal for a New Online Graduate Degree Doctor of Engineering (Eng.D.) in Engineering Technology with a concentration in Surveying Engineering Technology*
Dated: October 4, 2023
3. *Memo from Kody Varahramayn, Vice President for Research and Dean of the Graduate School*
Dated: October 18, 2023
Subject: Proposal for a Doctor of Engineering program in Engineering Technology
4. *Memo from Kelly Sparks, Vice President for Finance and Administration and Chief Business Officer*
Dated: January 12, 2024
Subject: Fiscal Note: Online Eng.D. in Engineering Technology
5. *Email from MJ Sedlock, Chair of PcRRC Faculty Senate Committee*
Dated: February 21, 2024
Subject: FacSen Motion Passes - Eng.D. in Surveying Engineering Technology



**Vice Chancellor for
Academic and
Student Affairs
15 Estabrooke Drive
Orono, ME 04469**

Tel: 207-973-3211

Fax: 207-581-9212

www.maine.edu

Date: March 21, 2023

To: Joan Ferrini-Mundy, President
University of Maine (UM)

John Volin, Provost
University of Maine (UM)

The University of Maine

University of Maine
at Augusta


University of Maine
at Farmington

University of Maine
at Fort Kent

University of Maine
at Machias

University of Maine
at Presque Isle

University of
Southern Maine

From: Jeffrey St. John, Interim VCASA 
The University of Maine System (UMS)

Regarding: Intent to Plan – Doctor of Engineering (Eng.D.) in Engineering Technology

The Chief Academic Officer's Council (CAOC) reviewed the request submitted on March 16, 2023 by the University of Maine for an Intent to Plan of the Doctor of Engineering (Eng.D.) in Engineering Technology. The CAOC was supportive of this request. The Interim VCASA supports and approves this Intent to Plan.

This memo serves as formal confirmation of approval of the Intent to Plan of the Doctor of Engineering (Eng.D.) in Engineering Technology.

Please do not hesitate to let me know if you have any questions.

15.1

Proposal for a New Online Graduate Degree
Doctor of Engineering (Eng.D.) in Engineering Technology (E.T.)
with a concentration in Surveying Engineering Technology (SVT)
The University of Maine
October 4, 2023

PROPOSAL FOR NEW GRADUATE DEGREE

Doctor of Engineering (Eng.D.) in Engineering Technology (E.T.) with a concentration in Surveying Engineering Technology (SVT).

(The transcript will read: Doctor of Engineering in Engineering Technology, with a concentration in SVT.)

General Objectives

The Doctor of Engineering (abbreviated Eng.D for the remainder of this document) in Engineering Technology program is designed for advanced students looking to become an expert in their respective fields (a target cohort would be surveyors with professional licensure and a post-baccalaureate degree). This degree program can be completed 100% online and part-time for working professionals. Doctorate programs generally fall into one of two categories; academic (research-oriented) and applied (practicum-based). The University of Maine's proposed Eng.D. degree is a combination of the two philosophies. Students will work in a research area and become an expert in that field (through applied and experiential learning) leading to success in either an academic or professional career. In lieu of a traditional dissertation, Eng.D. students will produce a suggested minimum of three peer-reviewed papers that will be converted into a thesis as defined in University of Maine Graduate School Guidelines Policies and Regulations, 10.1.6 Guidelines for Using Publications(s) as Thesis or Dissertation of the Graduate School Policies and Requirements. Note 10.1.5 Publication of Research Results Prior to Acceptance of Thesis or Dissertation also may apply as general rules that must be followed. Faculty in the program will assist students in locating the appropriate journals to publish their applied research findings. The rest of this document refers to three peer-reviewed documents but note this is only a suggestion that is finalized by a student's committee's suggestion.

It is anticipated in the future that other concentrations in the Eng.D. from the School of Engineering Technology will be developed. The surveying engineering technology concentration is "first" due to the extensive documented need and past graduate education at the University of Maine in that field. This is similar to the current MS in Engineering Technology having current concentrations in SVT and Electrical Engineering Technology.

The rigors of a full-time residential doctoral degree program are generally not possible for many working surveyors. This new proposed program can be completed 100% remotely and part-time to accommodate working professionals. With the global market demand for masters level surveying engineering technology degrees (38 students currently at the University of Maine), a new and fully-online doctoral degree program will open the University of Maine to new markets. Current and past masters students have included faculty at the University of Maine and other institutions where a doctoral degree would enhance their professional progress and in certain cases are required for a tenure track position.

Evidence of Need

A Burning Glass report showed a PhD/doctorate in surveying engineering will relate to growth in the need for college faculty in that discipline by 52% from 2020-2030. The need is further demonstrated by more than twenty-five (25) letters of support (sent to the Associate Dean of the College of Engineering and Computing, and available upon request) from professionals advocating to the University of Maine that a doctorate as proposed is absolutely needed. This group includes professionals who will apply for the degree as soon as it is available.

Similar Doctorate programs do not exist at the online level in a surveying engineering technology concentration. The closest options are:

- (1) Purdue University
<https://polytechnic.purdue.edu/degrees/phd-technology> The PhD in Technology includes options in construction management technology; electrical, computer, mechanical and industrial engineering technologies plus engineering technology education (no surveying).
- (2) Texas A&M <https://engineering.tamu.edu/mtde/academics/degrees/graduate/deng/online-doctor-of-engineering.html> offers an online engineering doctorate.
- (3) Doctorate of Engineering (in person only) exist among other academic institutions at Stanford, Michigan, Georgia Tech., Rochester Tech., Berkeley, Clarkson, Columbia, Colorado State.

The uniqueness of an engineering technology doctorate completely online is thus documented.

In person PhD programs in surveying related fields exist at Texas A&M Corpus Christi, University of Florida, and Purdue University. Unfortunately the graduates of these programs have not chosen career paths as surveying faculty. For example no graduates of these programs applied during the two national searches for new SVT faculty positions at the University of Maine conducted over the last four years. Two PSM graduates from the University of Maine considered PhD's at these programs (and were accepted) but have decided to wait for the Eng.D. at the University of Maine. Similarly four to six others are waiting for the approval of the degree in order to apply.

The closest PhD/doctorate in the University of Maine System is the PhD in Spatial Information Science and Engineering. This degree does not include in its description the term "surveying" and it is not an online degree.

Support

Post-baccalaureate level instruction in surveying engineering technology began in 2015 and as of May 2023, (31) students have graduated. Similarly, (15) have received graduate certificates in Surveying Engineering Technology since its inception in 2018. The doctoral degree would be modeled on the PhD in surveying engineering that previously existed at the University of Maine from 1988 to 2002 that resulted in several graduates having distinguished careers as surveying faculty across the United States. Mechanisms are thus in place to support students in a new Eng.D. program and the proposed program can start with the resources that are currently available. However, as the Eng. D. program is anticipated to grow, additional students will join the over 300 undergraduate and graduate students

currently enrolled in SVT certificate and degree programs, and this may lead us to seek permission to add tenure track faculty positions to the existing four.

Timeline

The desired timeline would optimally be to offer the program to students in the Spring of 2024. As noted a number of individuals are prepared to apply immediately and begin their studies.

Program Information

Each Eng.D. surveying engineering technology concentration candidate must complete a minimum of 42 credits of graduate education (beyond the baccalaureate) including a dissertation that includes three papers published in peer-reviewed journals or conference proceedings. The 42 credits include a minimum of 30 graduate course credits as approved by the graduate committee and a minimum of 12 SVT thesis credits. The 1 cr. course INT 601 – Responsible Conduct of Research (RCR) must be taken to satisfy the graduate school RCR requirements and it may be substituted for one thesis credit. The graduate course credits cannot exceed 6 credits of courses numbered 400-499 (or equivalent numbering at another academic institution). A typical 30 credits are defined in the Master of Science Engineering Technology surveying engineering technology (SVT) option detailed at <https://online.umaine.edu/online-master-of-science-in-engineering-technology/> or in the Professional Science Masters in Engineering and Business surveying engineering option detailed at <https://online.umaine.edu/grad/professional-science-masters-in-engineering-and-business/>. The Advisory Committee approves the proposed minimum of 42 credits in the first year of the Eng.D. and approves any changes if required. The minimum of 42 credits are to be approved as completed at the time of the qualifying defense. The standard residence (time spent in doctoral study) requirements, course credit transfer limits, and minimum limit of University of Maine credits in sections 4.1 and 4.5 of the University of Maine Graduate Catalog must be satisfied. Only credits earned at the post-baccalaureate level may be applied.

The current SVT and related graduate course work includes:

- ANT 521: Geographic Information Systems I (3 credits)
- ANT 522: Geographic Information Systems II (3 credits)
- ENV 586: Advanced Project Management (3 credits)
- GEE 694: Graduate Engineering Internship and Experiential Learning (6 credits)
- SIE 509: Introduction to Geographic Information Systems (3 credits)
- SVT 437: Practical GPS (3 credits)
- SVT 475: Small Business Management (3 credits)
- SVT 501: Advanced Adjustment Computations (3 credits)
- SVT 511: Geodetic US Public Land Survey Computations (3 credits)
- SVT 512: Advanced Survey Law (3 credits)
- SVT 531: Advanced Digital Photogrammetry (3 credits)
- SVT 532: Survey Strategies in Use of Lidar (3 credits)
- SVT 541: Geodesy (3 credits)
- SVT 542: Applied Hydrographic Surveying (3 credits)

- SVT 598 Special Topics in Surveying Engineering Technology (3 credits) (in course proposal process)
- INT 601: Responsible Conduct of Research (1 cr)
- SVT 699: Graduate Thesis/Research will be added when doctorate is approved

Major Advisor and Advisory Committee

The major advisor/committee chair is responsible for overseeing the refereed publications and the dissertation that contains them. The major advisor typically is selected in advance of enrollment. The major advisor/committee chair will be a member of the SVT faculty graduate faculty who has a PhD/doctorate. It is possible to have co-chairs where the first co-chair will be a member of the SVT faculty graduate faculty who has a PhD/doctorate. The second co-chair does not have to be SVT graduate faculty but must be a member of the graduate faculty of University of Maine with a PhD/doctorate. The major advisor advises the student of the composition of the advisory committee. Faculty (or external reviewers) who serve on an advisory committee are expected to review and approve the student's coursework (program of study), provide advice, regularly assess the student's progress and accomplishments, and administer the Comprehensive and qualifying examinations for the Eng.D.

The advisory committee must consist of five members, at least two of whom must be SVT graduate faculty with a PhD/doctorate. The remaining committee members may be any University of Maine graduate faculty with a PhD/doctorate. It is recommended (not required) that one member be a University of Maine graduate faculty external to the University of Maine. The creation and approval of the advisory committee is part of the student's program of study which is approved by the committee and submitted to the School of Engineering Technology (SET) Graduate Coordinator for approval and conveyance to the Graduate School. A change to the committee must be approved by all remaining committee members and the SET Graduate Coordinator and then forwarded to the Graduate School.

Program of study

Eng.D. students should file a program of study before the completion of the student's second semester and receive advisory committee approval. It is then forwarded to the SET Graduate Coordinator who forwards it to the Graduate School. Changes to the program of study follow the same process.

Eng.D. Comprehensive Examination

This follows the guidelines established at <https://umaine.edu/graduate/students/progress/program/> but note additional suggested requirements for the Eng.D. follow. At many other institutions this is called a "preliminary" exam.

This is a required examination. Its purpose is to determine the student's mastery of graduate coursework and the ability to publish in peer-reviewed scholarly publications. It is an oral

(synchronous if online) exam administered by the student's advisory committee. In addition the student must present a potential manuscript for publication, a research proposal, a professional survey report, or other advisory committee approved document used to assess success at peer-reviewed publication. The purpose is to evaluate quality, determine deficiencies, and possibly determine whether the student should continue. It is usually taken when the student is nearing completion of required coursework (not thesis credits). SVT requires a minimum of 6 months between the Comprehensive and qualifying exams. A maximum of one negative vote is permitted on a Comprehensive exam. If the Comprehensive exam is deemed unsatisfactory 15 weeks must lapse until it is re-administered. The Comprehensive exam cannot be attempted more than twice. An additional component of the Comprehensive exam will be a written document defining an outline of the dissertation which will be approved by the advisory committee. The three required peer-reviewed publications will be required as part of the dissertation outline. The publications cannot be accepted or published prior to the person being accepted into the doctorate program. It is possible a paper can be submitted prior to being accepted into the doctorate program only if the advisory committee accepts it. Under no circumstances will a paper that has been accepted or published prior to acceptance into the doctorate program be allowed. Co-authors are allowed but the doctoral candidate should be the primary author in all publications.

Eng.D. Dissertation

The Eng.D. Dissertation follows the general rules specified in 10.1.6 Guidelines for Using Publications(s) as Thesis or Dissertation of the Graduate School Policies and Regulations that has been previously referenced. Note 10.1.5 Publication of Research Results Prior to Acceptance of Thesis or Dissertation also may apply as general rules that must be followed.

The dissertation should be an original contribution to the literature in SVT. The style, organization, and standards of the dissertation should be equivalent to those for papers in peer-reviewed journals in SVT. The dissertation follows what is often called "journal manuscript" or "using publications as dissertation" format. The student prepares and submits peer-reviewed and accepted journal articles which serve as the main body of the dissertation. A suggested format for the "journal manuscript" dissertation is:

- (a) Abstract
- (b) Acknowledgments
- (c) Table of Contents
- (d) List of Tables
- (e) List of Figures
- (f) Introduction
- (g) Literature Review
- (h) Manuscripts/Published Papers (note (g) will often be duplicated here in some form)
- (i) SVT Significance or Conclusions
- (j) Appendices

References can be listed at the end of each section, or as a separate section just before Appendices. Since (g) and (h) can be overlapping it is possible to receive a waiver of the requirement of Literature Review per unanimous approval of the advisory committee.

Appendices are often important in complete documentation of the work performed. In many cases page limits on published manuscripts will limit complete content. Example of possible content in appendices could include

- (a) Documentation not provided in manuscripts (due to page limits) or procedures and methodologies not described elsewhere.
- (b) Archiving of data and data that forms the basis of presented results in the manuscripts that is not in the manuscripts.
- (c) Data management plan(s).
- (d) Supplemental information not in the manuscripts.

Eng.D. Qualifying (Final) Examination

An Eng.D. student must take a qualifying (final) oral examination (synchronous if online) administered by the advisory committee. A draft of the dissertation document must be submitted to the advisory committee at least four weeks before requesting approval for the qualifying examination. The qualifying examination cannot be scheduled until the dissertation has been approved by the major advisor. The remainder of the advisory committee has two weeks to submit concerns, suggested changes, etc. after the draft has been submitted. At the qualifying examination the student will present a review of the work and be prepared to defend it based upon questions from the advisory committee. A unanimous approval is required or the qualifying examination will be re-scheduled. The dissertation document needs to meet the rules specified by the Graduate School.

Eng.D. Progress Reports

The advisory committee will be kept informed by the student of progress through committee meetings, individual student meeting with a committee member, or by written reports from the student. Progress information should be provided by the student at least annually.

A written annual report is required. Each student will electronically submit a summary report to the committee discussing progress and achievements. Plans for future progress should be included in the report. The major advisor is required to respond to the student and committee members regarding the report. Any remedial action will contain a date by which it must be completed. Summary reports should be limited to one page.

Principal Program Developers :

S. David Dvorak, School of Engineering Technology Graduate Coordinator

Raymond Hintz, SVT Program and Graduate Coordinator, School of Engineering Technology

Will Manion, Director of the School of Engineering Technology

Mohamad Musavi, Associate Dean of the College of Engineering and Computing

Kody Varahramyan, Dean of the Graduate School

Typical SVT Graduate Faculty/ major professors/ graduate committee members

Raymond Hintz, PhD, Professor of Surveying Engineering Technology, Full Graduate Faculty, Surveying Engineering Technology concentration Graduate Coordinator

Carlton Brown, PhD, Associate Professor of Surveying Engineering Technology, Associate Graduate Faculty

Knud Hermansen, PhD, JD, Emeritus Professor of Surveying Engineering Technology, Emeritus Graduate Faculty

Tora Johnson, PhD, Professor of Environmental and Biological Sciences (University of Maine Machias), Full Graduate Faculty through the School of Forest Resources

Danny Swain, PhD, Adjunct Professor of Surveying Engineering Technology, External Graduate Faculty

The School of Engineering Technology's Graduate Coordinator is S. David Dvorak, PhD.

Future Program Evaluation Process

This proposal is unanimously supported by the SVT program's Industrial Advisory Committee (IAC). The IAC will regularly assess the success of the Eng.D. degree program and make suggestions to the faculty for its continuous improvement, as warranted. Each year the graduate coordinator of SVT will prepare a summarizing report documenting the status, milestones and future plans for this degree. The summary report should be limited to one page. This report will be forwarded to three faculty/professionals with surveying PhD/doctorates from outside of the University of Maine for program quality assessment.

Short term goals will be to have four or more admitted doctoral candidates by year 1. In years 2-5 the goal is to admit 2 or more additional doctoral candidates per year. After year 5 the goal is to maintain 12 or more doctoral candidates. Peer reviewed publications (required in the program) will be closely documented to ensure progress is being made toward completion of the doctorate. Beginning in year 3 the goal is to graduate 2 students per year. These numerical goals could be raised up based on new SVT faculty with PhD/doctorates who will advise doctoral candidates.

American with Disabilities Act (ADA) accommodations

The doctorate will follow the guidelines presented at the Office of Equal Opportunity for the University of Maine at <https://umaine.edu/eo/disability-access/> and more generically defined at <https://www.ada.gov/>. As this degree is 100% online format many potential disability issues such as building access, parking, etc. have been removed. With the graduate course content being asynchronous all lectures have closed caption ability/access.

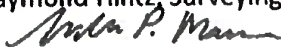
Submitted By:



08-17-23

Raymond Hintz, Surveying Engineering Technology Graduate Coordinator

Date



8-22-23

Will Manion, Director of School of Engineering Technology

Date

Approved By:



8-22-23

Giovanna Guidoboni, Dean

Date

Maine College of Engineering and Computing



8-25-23

Hannah Carter, Associate Provost

Date

Division of Lifelong Learning



10/18/23

Kody Varahramyan, Vice President for Research

Date

And Dean of the Graduate School

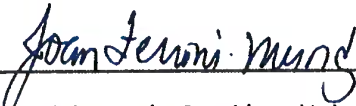


John Volin, Executive Vice President for Academic Affairs

2/22/24

Date

And Provost



2/25/24

Joan Ferrini-Mundy, President University of Maine

Date

15.1

Office of the Vice President
for Research and Dean of
the Graduate School



5703 Alumni Hall, Room 201
Orono, Maine 04469-5703
Fax: 207-581-1300
Tel: 207-581-1506
umaine.edu/research

October 18, 2023

To: John Volin, Ph.D.
Executive Vice President for Academic Affairs and Provost

From: Kody Varahramyan, Ph.D.
Vice President for Research and Dean of the Graduate School

Re: Proposal for a Doctor of Engineering program in Engineering Technology

At the first meeting of the Graduate Board on September 28, 2023, the members of the Board considered a proposal for a Doctor of Engineering in Engineering Technology to be offered through the University of Maine's School of Engineering Technology. The initial proposed concentration in this completely online doctoral program is in Surveying Engineering Technology building on a very successful online master's degree program in Surveying Engineering Technology.

The proposed doctoral program requires a total of 42 credits beyond the bachelor's degree, of which 15 credits including dissertation credits are core requirements. The remaining 27 credits would be selected from a list of courses that would satisfy the Surveying Engineering Technology concentration.

The Graduate Board unanimously approved this proposed degree program at its September meeting. Moreover, I do endorse and approve this proposal, and I am forwarding it to you for your review and further action.

Please feel free to contact me if I may address any questions related to this proposed professional degree program.

Attachment: *Doctor of Engineering in Engineering Technology proposal*

15.1

Office of the Vice President for Finance and
Administration & Chief Business Officer



5703 Alumni Hall, Suite 118
Orono, Maine 04469-5703
Tel: 207.581.1552
umbudget@maine.edu
umaine.edu

MEMORANDUM

January 12, 2024

TO: **John C. Volin**
Executive Vice President for Academic Affairs & Provost

FROM: **Kelly Sparks**
Vice President for Finance and Administration & Chief Business Officer

CC: **Kalyn Black**, Exec. Asst. to Executive VP for Academic Affairs & Provost
Corey Watson, Senior Financial Analyst

SUBJECT: **Fiscal Note: Online Eng.D. in Engineering Technology**

The Maine College of Engineering and Computing (MCEC) proposes an online doctoral program in Surveying Engineering Technology (SET), effectively expanding on the online master's degree program in SET. The proposed doctoral program anticipates a maximum enrollment of 10 doctoral students within the first four years of inception. As this program builds off the existing master's degree program in SET, the net new revenue associated with this program would be the incremental tuition of the additional 15 credit hours per student.

Revenues

At the estimated maximum program enrollment of 10 and an incremental 15 credit hours per student, we estimate tuition and fees to be \$106,875. Accounting for estimated tuition waivers and discounts of \$5,243, estimated net revenue for the Online Eng.D. in Engineering Technology at maturity is \$101,633.

Expenses

Based on the existing proposal, we are estimating online incremental expenses associated with advising doctoral students and serving on dissertation committees. We assume an additional compensation pool of \$18,750 plus fringe for this work. No other personnel or operating expenses are expected for offering this program. We include a \$8,906 budget for administrative and operational expenses across the institution associated with serving these students. The total projected expenses of this program are \$29,100.

Net Income

Based on projected revenues and estimated expenses, I believe the Online Eng.D. in Engineering Technology will generate incremental income of \$72,533 at its maturity based on current tuition and expenses. It is unlikely to cannibalize from existing programs, instead offering existing master's students a viable doctoral pathway to meet their career goals. It also assists with achieving both our MCEC goals under UMS TRANSFORMS and our R1 classification by increasing the availability of doctoral graduates at UMaine.

I have no hesitation about supporting this revenue-generating program and commend Dean Guidoboni and the MCEC faculty for their endorsement of this proposal. Please do not hesitate to let me know if you have any questions or concerns.

Program Name	Online Eng.D. in Engineering Technology
Unit - Select from List	MCEC

Tuition Category - Select from List	Grad - Online Engineering
Estimated Maximum Program Enrollment	10
Resident Type	Resident 6
	Non-Resident 4

FTE Rate 90%

Revenues	
Tuition	104,850
Fees	2,025
Subtotal Tuition and Fees	106,875
Less Discounts and Waivers	(5,243)
Other Revenue	-
Total Revenue	101,633

Expenses	
Personnel Expenses	
0 FT Faculty: Tenure/Tenure-Track	-
0 FT Faculty: Lecturer	-
0 PT Faculty: Adjuncts	-
0 Professional Staff	-
0 Classified (Hourly) Staff	-
Other Compensation	18,750
Student Wages	-
Total Salaries	18,750.00
FT Fringe Benefits	-
PT Fringe Benefits	1,444
Subtotal Compensation	20,194

Direct Operating Expenses	
Supplies & Services	-
Travel	-
Capital Equipment Expense	-
Library Acquisitions	-
Other Expenses	-
Subtotal Direct Expenses	-
Administrative/Operational Support	8,906
Total Expenses	29,100
NET INCOME/(LOSS)	72,533

15.1

2/22/24, 7:53 AM

University of Maine System Mail - Fwd: FacSen Motion Passes - Eng. D in Surveying Engineering Technology



Dianne Avery <diannea@maine.edu>

Fwd: FacSen Motion Passes - Eng. D in Surveying Engineering Technology

1 message

Gabriel Paquette <gabriel.paquette@maine.edu>

Wed, Feb 21, 2024 at 5:35 PM

To: Kalyn Black <kalyn.black@maine.edu>, Dianne Avery <diannea@maine.edu>, John Volin <john.volin@maine.edu>

We should touch base tomorrow on next steps (to get this to the President and then on to the VCASA/Chancellor). Attachment from Senate as well as message from MJ will need to form part of this.

Gabe

Gabriel Paquette

Associate Provost for Academic Affairs & Faculty Development
5703 Alumni Hall, Suite 201 | Orono, ME 04469
207.581.3477 | gabriel.paquette@maine.edu



----- Forwarded message -----

From: **MJ Sedlock** <mary.j.sedlock@maine.edu>

Date: Wed, Feb 21, 2024 at 3:21 PM

Subject: FacSen Motion Passes - Eng. D in Surveying Engineering Technology

To: Raymond Hintz <ray.hintz@maine.edu>, Will Manion <wmanion@maine.edu>, Gabriel Paquette <gabriel.paquette@maine.edu>

Cc: Amanda Klemmer <amanda.klemmer@maine.edu>

Hello,

I am pleased to report that the Faculty Senate has just voted to pass the attached motion, which indicates the Senate's approval of the proposal for an Eng.D degree program in Surveying Engineering Technology.

Best of luck with the rest of the approval process,

MJ

Mary Jean (MJ) Sedlock

she/her

Senior Lecturer, Production Manager, & Technical Director

School of Performing Arts | Theatre/Dance Division

College of Liberal Arts and Sciences

University of Maine

Orono, ME 04473

mary.j.sedlock@maine.edu

207-581-1767 (office)

Theatre/Dance Production Hub

**University of Maine Faculty Senate
Program Creation and Reorganization Review Committee (PCRRC)**

Motion to Approve the Eng.D in Surveying Engineering Technology Program Proposal

Background:

The PCRRC has reviewed the Program Proposal for a new Eng.D degree in Surveying Engineering Technology pursuant to the procedures outlined in the PCRRC manual and UM System BOT Policy 305, APL X-P.1

The PCRRC held a committee meeting to discuss the proposal. Following, members of the committee submitted additional feedback and questions via email to the PCRRC Chair. The input was summarized and forwarded to the proposal authors.

The proposal authors provided a written response to the PCRRC comments and questions, including descriptions of changes made to the proposal based on the feedback received.

The proposal was shared with Faculty Senators as part of the materials distributed for the February 7, 2024 Faculty Senate meeting. Senators were asked to send feedback and questions to the PCRRC Chair. No feedback was received.

A public meeting was held on February 14, 2024 to allow all members of the campus community the opportunity to comment on the proposal. No additional feedback was received at that time.

Motion:

Having had feedback and questions from the PCRRC addressed by the proposal authors, and having heard no objections to the proposal from Faculty Senators, nor at the public meeting on February 14, 2024, the Faculty Senate hereby moves to approve of the Maine College of Engineering and Computing's program proposal for a New Eng.D degree program in Surveying Engineering Technology.

University of Maine System
Board of Trustees

AGENDA ITEM SUMMARY

NAME OF ITEM: New Academic Proposal: Master of Arts in Teaching - Whole Child Education, UMA

INITIATED BY: Dannel P. Malloy, Chancellor

BOARD INFORMATION:

BOARD ACTION: X

BOARD POLICY:

305.1 Program Approval, Review & Elimination Procedures

UNIFIED ACCREDITATION CONNECTION:

As emphasized in the 2023-28 University of Maine System Strategic Plan, unified accreditation is "the mechanism through which our universities and law school are able to maximize resources and capitalize on opportunities for growth and collaboration."

The Academic and Student Affairs Committee of the Board ensures that every effort is made to operationalize unified accreditation in its review of proposed academic programs.

The Vice Chancellor for Academic and Student Affairs has actively explored multi-university collaboration(s) for this proposed academic program with the system-wide Chief Academic Officers Council. The proposed program

___ represents a multi-university collaboration in the following way(s):

___ may represent a future multi-university collaboration under the following condition(s) and in the following way(s):

X does not represent a multi-university collaboration for the following reason(s):

This program's curricular emphasis is particular to UMA. However, the program will be offered through distance modalities to support educators throughout Maine and beyond. Discussions are underway with education programs throughout the University of Maine System to make this pathway available as a 4+1 program to current undergraduate education students, and to cross-link individual courses to allow current and future M.A. students at UM, USM, and UMF to engage with specialized Whole Child education coursework.

If the proposed academic program fulfills/advances one or more actions or goals in the UMS Strategic Plan, please indicate by name which action(s) and/or goal(s) that is, and how the proposed program will fulfill or advance it/them:

This proposal meets and advances the goal articulated in the Strategic Plan's Commitment 2 (Effective Academic Portfolio Actions section), Action 1:

Develop innovative programs and curricula responsive to changing economic and workforce needs, data-driven projections of growth areas, and technological innovation.

BACKGROUND:

Whole Child education refers to a wraparound approach to education that incorporates both the content and the climate of learning to create the physiological and psychological conditions for productive learning, taking the whole child's experience into account. UMA's Master of Arts in Teaching - Whole Child Education centers on providing learning opportunities that will support educators in creating relationship-centered learning spaces; creating curricula, instruction, and assessments for deeper learning; offering integrated student support; preparing teachers for Whole Child practice; and encouraging policymaking that supports every child.

The Academic and Student Affairs Committee forwards this item to the Consent Agenda at the May 19-20, 2024, Board of Trustees meeting for approval of the following resolution:

TEXT OF PROPOSED RESOLUTION:

That the Board of Trustees accepts the recommendation of the Academic and Student Affairs Committee, and approves the Master of Arts in Teaching - Whole Child Education at the University of Maine at Augusta.

Attachment

[UMA MA in Teaching, Whole Child Education](#)



UMS Academic and Student Affairs
Estabrooke Hall
Orono, Maine 04469
207-973-3211
www.maine.edu

Date: April 1, 2024

To: Dannel Malloy, Chancellor
University of Maine System (UMS)

From: Jeffrey St. John, VCASA JS

Regarding: New Program Addition, Master of Arts in Teaching, Whole Child Education, UMA

Please find the attached program proposal from the University of Maine at Augusta to offer the Master of Arts in Teaching - Whole Child Education. The attached material includes documentation of university level support including approval from President Cushman and the full program proposal.

The proposed addition of the Master of Arts in Teaching - Whole Child Education was reviewed and recommended by the Chief Academic Officers Council on March 7, 2024. I also recommend this program for your approval.

I approve	I do not approve for the reasons listed below	Additional information needed for decision	Action
✓			Recommend the M.A.T. in Whole Child Education program at the University of Maine at Augusta


Chancellor Dannel Malloy

4.2.24
Date

16.1

Maine's Public Universities

University of Maine • University of Maine at Augusta • University of Maine at Farmington
University of Maine at Fort Kent • University of Maine at Machias • University of Maine at Presque Isle
University of Maine School of Law • University of Southern Maine



OFFICE OF THE VICE PRESIDENT
FOR ACADEMIC AFFAIRS & PROVOST

207.621.3360 *office* / 207.621.3293 *fax*

46 University Drive, Augusta, Maine 04330-9488
www.uma.edu | 1.877.UMA.1234

MEMORANDUM

TO: Jeffrey St. John
Vice Chancellor of Academic Affairs

FROM: Joseph Szakas *JSS*
Vice President of Academic Affairs/Provost

DATE: February 29, 2024

SUBJECT: Program Proposal (Steps 2 & 3): Master of Arts in Teaching – Whole Child

The University of Maine at Augusta (UMA) is seeking approval of a program proposal for a Master of Arts in Teaching – Whole Child Education to begin in the Fall of 2024.

Rationale:

Whole Child Education, as well as related concepts subsumed under that umbrella, such as Social-Emotional Learning, “Grit,” and Growth Mindset are seen as trending terms, but research has long evidenced the need to foreground education practices that acknowledge the relationships between children's physical and mental health and their social, emotional, cognitive, and academic development. To ensure that every child realizes their fullest potential, Whole Child Education gives priority to all of a child's developmental needs. A Whole Child approach recognizes that access to rich learning opportunities both inside and outside of the classroom, as well as safe, inviting, engaging learning settings, are critical to students' education and future success.

APL X-P.1 “Academic Program Approval,” Step 2: Development of Program Proposal, states that upon approval of an ITP from the VCASA office, a Program Proposal will be prepared and evaluated through the university's normal curricular process(es). After completion of the program proposal, the university-level evaluation is initiated by the distribution of the proposal to the university's normal curricular process.

UMA's Intent to Plan for a MAT-Whole Child Education was reviewed by the Chief Academic Officers in October 2023 and approved by the Vice Chancellor of Academic Affairs on October 19, 2023. The MAT-Whole Child Education has received full review and approval by the appropriate campus stakeholders including the Education Department Coordinator, Dean of the College of Arts and Sciences, UMA Curriculum Committee, UMA Faculty Senate, myself and

the President. In addition, UMA's MAT-Whole Child Education program has received support from the University of Maine at Farmington, the University of Maine and University of Maine at Machias, the University of Southern Maine, and the University of Maine at Presque Isle.

APL X-P.1 "Academic Program Approval," Step 3: University of Maine System (UMS) Evaluation states, after campus approval of the new program proposal, the University of Maine System (UMS) review is initiated by submission of the proposal by the University President (or designee) to the Vice Chancellor for Academic and Student Affairs (VCASA), who will acknowledge receipt of the document and distribute the proposal electronically to the members of the CAOC. The CAOC will review and discuss the proposed program at the first available CAOC meeting.

Please let me know if you have any questions or require additional information.



**Vice Chancellor for
Academic and
Student Affairs
15 Estabrooke Drive
Orono, ME 04469**

**Tel: 207-973-3211
Fax: 207-581-9212
www.maine.edu**

The University of Maine

University of Maine
at Augusta

University of Maine
at Farmington

University of Maine
at Fort Kent

University of Maine
at Machias

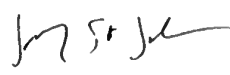
University of Maine
at Presque Isle

University of
Southern Maine

Date: October 19, 2023

To: Jenifer Cushman, President
University of Maine at Augusta (UMA)

To: Joseph Szakas, Provost
University of Maine at Augusta (UMA)

From: Jeffrey St. John, VCASA 
The University of Maine System (UMS)

Regarding: Intent to Plan – M.A. in Whole Child Education

The Chief Academic Officers Council (CAOC) reviewed the request submitted on October 19, 2023 by the University of Maine at Augusta for the Intent to Plan of the M.A. in Whole Child Education. The CAOC was supportive of this request. The VCASA supports and approves this new Intent to Plan.

This memo serves as formal confirmation of approval of the Intent to Plan of the M.A. in Whole Child Education.

Please do not hesitate to let me know if you have any questions.



OFFICE OF THE PRESIDENT

207.621.3041 office | 207.621.3393 fax

46 University Drive, Augusta, Maine 04330-9488
www.uma.edu | 1.877.UMA.1234

MEMORANDUM

TO: Jeffrey St. John
Vice Chancellor of Academic Affairs

FROM: Jenifer Cushman, President
Joseph Szakas, Vice President of Academic Affairs/Provost

DATE: February 29, 2024

SUBJECT: Master of Arts in Teaching – Whole Child Education

Please accept this memo as our full support and approval of a Master of Arts in Teaching – Whole Child Education. The intent to plan was previously submitted and approved on October 19, 2023.

Please let us know if you need additional information.

Best,



Jenifer Cushman, President



Joseph Szakas, Provost



Cynthia Dean <cynthia.dean@maine.edu>

UMA MAT Proposal

2 messages

Katherine Yardley <kyardley@maine.edu>
To: UMA-Cynthia Dean <cynthia.dean@maine.edu>

Fri, Jan 19, 2024 at 9:12 AM

Hi Cindy,

Thank you for sharing UMA's proposed MAT in Whole Child Education with me. The proposed curriculum looks interesting and will strengthen educators' work with all students. UMF supports you and your colleagues in bringing this proposal forward.

All the best,
Kathy

Katherine W. Yardley
Interim Co-Provost
Dean College of Education, Health, and Rehabilitation
University of Maine at Farmington
Farmington, ME 04938
Tel. 207-778-7154

Fri, Jan 19, 2024 at 9:55 AM

Cynthia Dean <cynthia.dean@maine.edu>
To: Katherine Yardley <kyardley@maine.edu>

Dear Kathy,
Thank you for your endorsement. It is very much appreciated.

Best,
Cindy



Cindy Dean, Ed.D.
*Professor of Education
Coordinator of Teacher Education
Faculty Senate President
Vice President AFUM Augusta campus
University of Maine at Augusta*
pronouns: she/her/hers
207.621.3192
46 University Drive, 229 Randall Student Center
Augusta
cynthia.dean@maine.edu



Cynthia Dean <cynthia.dean@maine.edu>

UMA's MAT proposal

Penny Bishop <penny.bishop@maine.edu>
To: Cynthia Dean <cynthia.dean@maine.edu>

Fri, Jan 19, 2024 at 1:50 PM

Good afternoon Cindy,

Thank you for the opportunity to review and weigh in on UMA's proposal to establish an MAT program in Whole Child Education. The University of Maine's College of Education and Human Development holds no objections to this proposal.

Best regards,
Penny Bishop

1/16/24, 11:03 AM

University of Maine System Mail - MAT whole child education



Cynthia Dean <cynthia.dean@maine.edu>

MAT whole child education

Heather Ball <hball@maine.edu>

Mon, Jan 15, 2024 at 2:58 PM

To: Cynthia Dean <cynthia.dean@maine.edu>

Hi again, Cindy,

I heard back from our dean on your request. You are correct that UMM faculty had no concerns about the proposal but now that we are a unit of UM, if UM has concerns, we will support UM's position.

I hope this helps,

Heather

On Thu, Jan 11, 2024 at 2:23 PM Cynthia Dean <cynthia.dean@maine.edu> wrote:

[Quoted text hidden]

[Quoted text hidden]

1/8/24, 2:41 PM

University of Maine System Mail - UMA's MAT in Whole Child Education proposal

16.1



Cynthia Dean <cynthia.dean@maine.edu>

UMA's MAT in Whole Child Education proposal

Andrea Stairs-Davenport <andrea.stairs@maine.edu>
To: Cynthia Dean <cynthia.dean@maine.edu>

Mon, Jan 8, 2024 at 2:43 PM

Hi Cindy,

Happy New Year! As expressed in our previous email and at our UMS Deans and Directors Meeting, USM supports UMA's proposal for a new MAT in Whole Child Education. It is distinct from other UMS offerings, and it will add value to the field of education in Maine and beyond.

Good luck!
Andrea

On Mon, Jan 8, 2024 at 2:08 PM Cynthia Dean <cynthia.dean@maine.edu> wrote:
[Quoted text hidden]

Andrea Stairs-Davenport, PhD
Associate Dean, School of Education and Human Development
Professor, Department of Literacy, Language, and Culture
Site Director, Southern Maine Writing Project
Co-Editor-in-Chief, Wellspring: A Practitioner-Oriented Journal of Literacy and Language Education
University of Southern Maine
218A/F and 8 Bailey Hall
Gorham, ME 04038
(207) 780-5971
she/her/hers



Cynthia Dean <cynthia.dean@maine.edu>

UMA's MAT in Whole Child Education proposal

Mon, Jan 8, 2024 at 2:21 PM

Wendi Malenfant <wendi.malenfant@maine.edu>
To: Cynthia Dean <cynthia.dean@maine.edu>

Hi Cindy,

The MAT in Whole Child Education sounds like a wonderful program that will benefit both teachers and children, and you have the full support of the Educator Preparation Program at the University of Maine at Presque Isle. Best wishes! :)

Wendi

P.S. Please let me know if you need a formal letter/email. :)
[Quoted text hidden]



Wendi L. Malenfant, Ph.D.
Director, Education Program
Associate Professor of Education
College of Professional Programs

University of Maine at Presque Isle
211 South Hall | 181 Main Street
Presque Isle, ME 04769
t: 207 768.9435
e: wendi.malenfant@maine.edu
www.umpi.edu

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MAT Whole Child Education

Proposed Master of Arts in Teaching Degree
Education Department, University of Maine at Augusta

“Educate our students as whole people, and they will bring all of who they are to the demands of being human in private and public life. The present and future well-being of humankind asks nothing less of us.” –Parker J. Palmer

1. MAT Program Objectives and Content

Whole Child Education, as well as related concepts subsumed under that umbrella, such as Social-Emotional Learning, “Grit,” and Growth Mindset are seen as trending terms and buzzwords, but the reality is that decades of existing, compelling research have long evidenced the need to foreground education practices that acknowledge the relationships between children's physical and mental health and their social, emotional, cognitive, and academic development. To ensure that every child realizes their fullest potential, Whole Child Education gives priority to all a child's developmental needs. A Whole Child approach recognizes that access to rich learning opportunities both inside and outside of the classroom, as well as safe, inviting, engaging learning settings, are critical to students' education and future success.

This proposed program, delivered through distance modalities, centers on providing learning opportunities that will support educators in creating relationship-centered learning spaces; creating curricula, instruction, and assessments for deeper learning; offering integrated student supports; preparing teachers for Whole Child practice; and encouraging policymaking that supports every child. [New research in neuroscience and learning and development sciences](#) shows that stable attachments, affirming interactions, rich hands-on learning experiences, and explicit integration of social, emotional, and academic skills are essential for optimal learning. In addition to fostering students' progress along all developmental trajectories—physical, psychological, cognitive, social, and emotional—this Whole Child approach also lowers the stress, anxiety, and trauma responses that can lead to biological barriers to learning. A Whole Child approach can help to establish not only the content but the climate for learning that creates the physiological and psychological conditions for productive learning.

This program also assists learners in understanding that a Whole Child approach must also consider the Whole School and Whole Community. Doing so meaningfully bridges the gaps and disunions between school stakeholder groups that existed pre-pandemic but

was magnified significantly by the COVID-19 pandemic. One of those disunions, systemic siloing, has long been deeply problematic in American education. Historically, K–12 education has been positioned as distinct from other systems that support children and youth, such as higher education, after-school and out-of-school activities, juvenile justice, physical and mental health, child and family services, and early childhood education, to name only a handful of examples.

Graduates of this program who understand A Whole School, Whole Community, Whole Child, (or WSCC) model can better advocate for the need for these stakeholder groups to coalesce to offer a student-centered, wraparound approach, which emphasizes the role of the community in supporting the Whole Child. They will understand the model underscores the connections between health and academic achievement, the importance of evidence-based school policies and practices, and how the model promotes long-term development and success, transitioning schools from a “traditional” focus on narrowly defined academic achievement to one that promotes the long-term development and success of all children.

Furthermore, the program will emphasize how the WSCC model also addresses the need to engage students as active participants in their learning and health, how schools play a critical role in promoting the health and safety of young people, and how the model can assist learners establish lifelong healthy behaviors. In emphasizing a unified and collaborative approach designed to improve learning and health, we can leverage the school as the hub of community to connect and unite education and education-adjacent stakeholders in support of the Whole Child, including families and, importantly, community agencies.

This MAT degree program will train learners to seek opportunities to engage the entire school community and its many important stakeholders by emphasizing education practices that acknowledge the relationships between children's physical and mental health and their social, emotional, cognitive, and academic development.

Because learners in this MAT program will either be educators in service or recent graduates of education programs where extensive field placements were requisite components of their preparation, each of the learners will have encountered real-world problems of practice, being and having been stakeholders and members of the school community . Through research, reflection, and case study, they will examine Whole Child solutions for those problems.

Therefore, the broad aims of UMA’s MAT in Whole Child Education are, 1) Setting a Whole Child Vision; 2) Transforming Learning Environments, 3)“Rethinking”

Curriculum, Instruction, Assessments, and Systems; 4) Building Adult Capacity and Expertise, and 5) Foregrounding Diversity, Equity, Inclusion, and Belonging.

Program Curriculum

30-33 credit program (non-licensure)

- EDU 530—The Whole Child (3 credits)
- EDU 540—The Whole Educator (3 credits)
- EDU 550—Whole School . . . Whole Community . . . Whole Child (3 credits)
- EDU 420/520—Teaching, Learning, and Organizing for Equity, Social Justice, and Change (3 credits)
- EDU 510—Restorative Practice (3 credits)
- EDU 580—The “Just-Right” Challenge (3 credits)
- EDU 497/597—Social-Emotional Learning: Core Competencies (3 credits)
- EDU 444/544—Resilience and Self-Care for Educators (3 credits)
- EDU 479/579—Trauma-Sensitive Classrooms (3 credits)
- EDU 590—Capstone Thesis (possible repeated enrollment) (3+ credits)

MAT Course Descriptions:

EDU 530—The Whole Child:

While research has underscored the need for educational practices that emphasize the connections between children’s social, emotional, cognitive, and academic development, as well as their physical and mental health, the recent COVID-19 pandemic brought those concerns into sharpest relief. This foundational course helps educators to recognize and prioritize the full scope of the Whole Child’s needs, across the domains of health, safety, engagement, support, and challenge.

EDU 540—The Whole Educator:

Historically, Whole Child Education has been student-centered, but in order for learners to be fully supported, educators’ well-being must also be addressed and nurtured. This course introduces and explores the concept of the Whole Educator, focusing on educators’ needs across the domains of health, safety, engagement, support, and professional challenge.

EDU 550—Whole School . . . Whole Community . . . Whole Child:

For the last two decades, the education, public health, and school health sectors have called for greater alignment, integration, and collaboration to improve every child's cognitive, physical, social, and emotional development. This course explores a Whole School, Whole Community, Whole Child model that focuses on the common goals of these sectors to put a Whole Child approach into action.

EDU 420/520—Teaching, Learning, and Organizing for Equity, Social Justice, and Change:

This course will provide current or aspiring educators practical knowledge and skills to begin and sustain anti-bias and anti-racist work in their classroom and school. Also, students in this course will design learning experiences that enable their current or future pK-12 students to develop a consciousness of societal inequities and injustices, while empowering them with the knowledge and skills to collectively work toward equity and justice.

EDU 510—Restorative Practice:

Restorative practices encourage a mindset shift, emphasizing accountability, making amends, and facilitating dialogue, helping students learn to resolve disagreements, take ownership of their behavior, and engage in acts of empathy and forgiveness. This class will explore, in practical terms, what a shift away from punitive punishments can look like inside schools and classrooms.

EDU 580—The “Just-Right” Challenge:

Every student deserves deep and rigorous learning that challenges and advances their thinking, considers the Zone of Proximal Development (ZPD), and issues the “just-right challenge.” This course offers educators a clear vision of what makes learning deep, rigorous, and transferable, and a systematic and equitable approach to engaging all students in rich learning tasks.

EDU 497/597—Social-Emotional Learning: Core Competencies:

Social-Emotional Learning (SEL) directly impacts students' abilities to integrate the skills, dispositions, and behaviors necessary for dealing effectively with challenges of all kinds, both inside and outside of school. This course affords learners fundamental knowledge of the five SEL core competencies and familiarizes them with instructional strategies that improve Social-Emotional competence and metacognition.

EDU 444/544—Resilience and Self-Care for Educators:

Teacher burnout, and its impact on professional satisfaction, efficacy, and retention, is an area of growing concern. The stressors of the profession can lead to secondary traumatic stress (commonly called “compassion fatigue”), emotional exhaustion,

cynicism, and professional inefficiency. By learning and practicing techniques for teacher self-care and resilience, educators can combat burnout and compassion fatigue, achieve compassion satisfaction, improve their wellbeing, and thrive.

EDU 479/579—Trauma-Sensitive Classrooms:

Childhood trauma is more prevalent than many may know. More than half of American youths experience a traumatic event by the time of their 16th birthdays, with many children suffering multiple or repeated traumas. Traumatic stress affects children's schooling, interfering with their ability to concentrate and learn, delaying development in their brains and bodies, and changing how children view their world and their futures. Caring adults can help through their capacity to listen, connect, and protect. This course will give pre-service educators the opportunity to cultivate those capacities for adaptation to a trauma-sensitive classroom setting.

EDU 590 Capstone Thesis:

The Master's Thesis is the culminating assessment of the MAT in Whole Child Education. As such, it is a serious, academically rigorous, capstone of the program, demonstrating the candidate's capacity to develop an argument based on research. The thesis is a piece of original scholarship, written under the direction of a faculty advisor. Learners will produce and defend a substantial research essay, the thesis of which is demonstrably related to the course of study.

2. Program Need (to include the detailed findings of the market analysis conducted in consultation with campus or University of Maine System (UMS) institutional researchers or other relevant programmatic information)

The COVID pandemic has [magnified the winners and losers in Maine's educational system](#). Just as Maine's schoolchildren have inequitable access to resources and high-quality instruction, so, too, do Maine's educators. While [these challenges are not uniquely Maine's](#), and this program will appeal widely to American educators, an MAT in [Whole Child Education](#) helps close the loop on too-long-unmet needs across our state.

The proposed MAT program is a leading-edge graduate degree. As more schools incorporate Whole Child Education (WCE) and Social-Emotional Learning (SEL) into their curriculum, the demand for teachers prepared in these areas is expected to grow. The U.S. Bureau of Labor Statistics does not supply data specific to Whole Child educators, but the [job outlook for overall employment in education](#), training, and library occupations is expected to grow 7% from 2021 to 2031. It is important to note that WCE and related SEL instruction have become more common due to demonstrated benefits to students, such as improved academic performance and behavior. In the 2021-2022 school year, [76% of principals and 53% of teachers reported using an SEL program](#) or materials

in their school. The global social and emotional learning (SEL) market size was valued at USD 2.31 billion in 2022 and is expected to grow at a CAGR of 24.3% from 2023 to 2030 (Grand View Research).

Groups ranging from the National PTA Initiative to The Center for Family Engagement, to Learning Policy Institute, to National Institutes of Health, to Economic Policy Institute have made Whole Child Education their [clarion call](#). [Recent research in neuroscience, developmental and learning sciences, education, sociology, and other fields confirms](#) that a Whole Child approach to education is desirable for fostering all areas of children's development and learning – including literacy, math, and science, as well as social-emotional and cognitive skills. Furthermore, integrating Whole Child Education in schools also has seen substantial support among voters. That recent survey from the Learning Policy Institute found that nearly nine in ten likely voters (85%) think it imperative that schools provide Whole Child Education. A teaching approach that acknowledges the full scope of a child's development lays the foundation to ensure that children are well-equipped to be engaged and lifelong learners.

Each of these groups and many others have underscored the importance of moving away from a narrow focus on learners' cognitive development in favor of a more holistic approach most apt to lead to positive outcomes in all domains of learners' lives.

A [recent survey of American educators](#) revealed that 88% of teachers believe that schools must adopt a broader definition of student success, inclusive of both academic and non-academic dispositions and skills, and that 62% of educators report that learners are more comfortable seeking their teacher's help when a Whole Child approach is employed. Further, two-thirds of educators reported that students take greater ownership of their learning as a direct result of having adopted a Whole Child approach in the classroom. The need is deep, and educators are using their voices to amplify that need. Training programs to meet educators' professional development needs in this area are scarce.

[Educators are not alone in sounding the alarm bell about “traditional” education](#). According to the 2020-2021 Speak Up Research Project, two-thirds of parents of school-age children report worrying about their child's emotional health due to the interruptions in their learning lives caused by COVID-19. Additionally, 43% of parents expressed concern that, absent a Whole Child approach, their child would not acquire the necessary abilities in school to succeed later in life.

These recommendations, metrics, and surveys clearly demonstrate the need for Whole Child Education. Accordingly, the Maine Department of Education has heeded these calls for action. Professional preparation, dispositions, and programming initiated or championed by the Maine Department of Education strongly encourages, though yet does not mandate, the Whole Child approach. The Maine Department of Education (MDOE)

has made clear its position on the importance of Whole Child training and practice for Maine educators for supporting and nurturing Maine students. In the academic years directly preceding the COVID-19 Pandemic, throughout it, and in the wake of it, the Maine Department of Education has championed, though not mandated, a shift in priority toward Whole Child tenets and practice. Initiatives the Maine DOE has championed, funded, and supported (described in brief detail below) include, but are not limited to: PreK for ME, K for ME, 1st Grade for ME, First 10, SEL for ME, and Maine's Whole Student Micro-Credentials.

Pre-K for ME: This research-based, Whole Child curriculum meets the requirements of Chapter 124: Public Preschool Program Standards and is developmentally appropriate for four-year-old children. Adapted from the Boston Public Schools' Focus on K1 curriculum, Pre K for ME is intended to support any preschool teacher in providing a rich, play-based, intentional curriculum that is aligned to Maine's Early Learning and Development Standards as well as the Head Start Early Learning Outcomes Framework. When implemented with fidelity, Pre K for ME builds social-emotional, executive function, language, literacy, math, and vocabulary skills. In addition, students' conceptual knowledge around a variety of topics is enhanced—an important component for school success.

K for ME: This interdisciplinary, Whole Child-focused instructional program is adapted from Boston Public Schools' Focus on K2 curriculum. K for ME supports Kindergarten students' learning and development in literacy and language, science and engineering, social studies, the arts, and social-emotional realms. The program integrates research-based instructional practices aligned to Maine's Learning Results while it builds children's agency as learners and citizens. Through its intentional and connected design, K for ME engages student thinking and doing around a variety of topics utilizing developmentally appropriate practices.

1st Grade for ME: This interdisciplinary, Whole Child-focused instructional program is adapted from Boston Public Schools' Focus on First curriculum. 1st Grade for ME supports students' learning and development in literacy and language, science and engineering, social studies, the arts, and social-emotional realms. The program integrates research-based instructional practices aligned to Maine's Learning Results while it builds children's agency as learners and citizens. Through its intentional and connected design, 1st Grade for ME engages student thinking and doing around various topics utilizing developmentally appropriate practices.

First 10: First 10 Schools and Communities are “partnerships of school districts, elementary schools, early childhood programs, and community partners that come

together to work on improving teaching, learning, and care for young children and their families” (Jacobson, 2019). These schools and community partners attend to whole child / whole student development by providing consistent quality of services to all children and families, aligning resources and supports across the first 10 years of children’s lives, and fostering smooth transitions at each stage of development. Families are essential partners in First 10 Schools and Communities, collaborating to nurture children’s development and well-being. During the First 10 years of life, the development of a child’s brain architecture provides the lifelong foundation to all future learning, behavior, and health. “The early years are the most active period for establishing neural connections, but new connections can form throughout life and unused connections continue to be pruned” (Harvard University, 2019). Brain development builds over time, starting prenatally and continuing throughout childhood. Children’s relationships and environments play a major role in the overall development of their brain architecture. “Experiences that are individualized to the child’s unique personality style; that build on his or her own interests, capabilities, and initiative; and that shape the child’s self-awareness” (Harvard University, 2019) are essential to overall development. When forming and implementing First 10 Schools and Communities, several components are critical to the design: Collaboration to Improve Teaching & Learning, Culturally Responsive Partnerships, Strategic Leadership, and Well-Coordinated & Comprehensive Services. Thoughtfully implemented, these components support whole child/whole student development across domains during the early childhood and elementary years as children progress toward fifth grade. These components also work in a coordinated fashion to ensure that families, schools, and community services (such as childcare, health care, parent education, etc.) achieve the fullest potential of their efforts.

[SEL for ME](#): SEL for ME includes CASEL-aligned and trauma-informed PreK-12th grade SEL curriculum, supports, and resources for school districts in Maine. Owned by the Maine Department of Education and designed to the unique needs of our State, SEL4ME has been constructed by professionals with 50+ years of experience in education, student/parent engagement and staff/administrator professional development. These expert-developed lessons are aligned with industry established best practices, are leveraged through an Equity lens and include over 450 modules that cover PreK-12 scaffolded by grade.

[Maine’s Whole Student Micro-Credentials](#): Maine ASCD and the Maine Department of Education collaborated to provide anywhere/anytime professional learning opportunities at no cost for all Maine educators and school staff. Maine ASCD, the Maine affiliate of the global ASCD organization, has been championing the Whole Child framework for more than a decade in Maine. Beginning in the 2017-2018 school year, Maine ASCD (led

by Executive Director Leigh Alley and Board Member and President Matt Drewette-Card) built a comprehensive micro-credential suite to support anywhere/anytime professional learning of the Whole Child and ASCD's Whole Child framework. Maine ASCD and the Maine Department of Education partnered to open access to the Maine ASCD micro-credential suite for ALL Maine educators and school staff at zero cost. Maine ASCD worked with Maine DOE to help educators rethink learning, approaching it from a holistic perspective, spanning the PK-12+ continuum.

These efforts, the list of which is not exhaustive, plainly illustrate the Maine Department of Education's preference toward education and professional development opportunities that prepare Maine's teachers to support the Whole Child, valuing the active development of students' cognitive and noncognitive skills.

In conclusion, there is clearly a need for an academic program that will prepare educators for the shift to holistic education as well as one that is accessible to a wide audience. UMA is uniquely positioned to provide this kind of graduate programming through distance modalities that will serve educators across the country as momentum continues to build around Whole Child education. UMA is fortunate to have Leigh Alley, a [leading expert in Whole Child Education](#), as part of their education faculty whose vision has expertly shaped the Whole Child program that we propose.

3. Differentiation from similar existing UMS programs or how programs will complement each other.

UMS teacher education preparation programs (EPPs) enjoy a collegial and collaborative working relationship. While each of our programs serves a unique and distinct population of students, we regularly share resources and information through our monthly Deans and Directors meetings, TeamE meetings, and shared google drives on various education topics. We work collaboratively to have a presence with the Maine Department of Education, especially the State Board's Committee on Higher Education and Certification. Several UMS EDU faculty helped shape the newest language in Chapter 115 and continue to provide feedback to the state board of education. The UMA EPPs met for a special education summit last spring to share information on addressing the special educator shortage in Maine. UMA, UMPI, and UMM are finalizing a cooperating departments MOU to share delivery of eleven special education courses. Put simply, the UMS EPPs enjoy a collegiality that we value highly.

Because of this collegial relationship, the UMS EPPs are highly sensitive to ensuring new programs are discussed with one another prior to planning. UMA discussed our desire to create this MAT in Whole Child Education at a Deans and Directors meeting in spring

2023 and again in a separate meeting with a faculty member who was unable to attend the collective meeting. We received valuable feedback, most of which we took into consideration as we continued to shape the program. We did not receive any feedback that led us to believe there was any opposition to us going forward. Our peers appeared to recognize that this is a leading edge, first-of-its-kind program in the state of Maine and provides UMA with a niche in graduate education that does not duplicate any existing program.

We envision once the program is approved, we will work with our colleagues to create 4+1 accelerated programs that will allow students from UMS educator preparation programs to transfer some of their undergraduate courses into the MAT or take UMA's whole child 400 level course as cross-linked courses. Conversely, we may be able to cross-link and transfer in other UMS graduate courses that might satisfy some of the course requirements of the MAT. We look forward to developing these cooperating departments MOUs to better serve all students in the UMS system.

4. Availability of resources and finances for sustainable program support

The Education Department at the University of Maine at Augusta stands well prepared with existing resources and finances to grow and sustain this program.

A. Personnel: The institution of this program will not change personnel needs at this time. We anticipate our full time and part time faculty will initially be able to support teaching and advising for this program, However, we anticipate a rapid growth in the program, particularly as we develop cooperating department MOUs for 4+1 accelerated programs and advertise this widely within Maine and beyond. Growth may necessitate another faculty position.

B. Facilities: At this time no specific additional facilities will be needed. This program will be offered entirely through distance modalities. Currently, the University of Maine at Augusta has the facilities and equipment to support this program.

C. Equipment: Currently no additional equipment is needed

D. Funding Sources: No additional funding is needed at this time

E. Library Resources: UMA's library added significant education holdings during the COVID-19 pandemic, including rich, supportive video databases of high-quality teaching in action. No additional resources are needed at this time.

F. Other: n/a

G. What additional new costs are required in any or all of the above

categories? None are needed currently.

Notes About the Especial Qualifications and Capacity of EDU Personnel

The three members of the full-time education faculty—Drs. Leigh Alley, Cindy Dean, and Timothy Surrette—as well as a diverse and highly-qualified pool of adjuncts stand ready to support the institution of this Master of Arts in Whole Child Education. As noted elsewhere in this document, Dr. Leigh Alley is a leading expert in Whole Child Education and led the creation of Whole Child micro-credentialing with the Maine Department of Education. The Curricula Vitae of the uniquely qualified full-time faculty are included as Appendix A.

5. Outline of the future program evaluation process

The program will be subject to institutional quinquennial reviews and annual reports. It may also be subject to quinquennial Maine Department of Education reviews.

Additionally, UMA's Education program regularly collects key assessment data to track student achievement of learning outcomes through Taskstream LAT. Reports on admissions, matriculation, and retention will also be valuable metrics to help shape and improve programming. We currently survey our graduates and anticipate including the graduate student body in this process. Feedback has and continues to help us shape and improve programming.

6. Accommodations for diverse accessibility needs under Americans with Disabilities Act (ADA)

At UMA, **Accessibility Services** is the department within the Division of Academic Success which is responsible for providing necessary accommodations to students with disabilities in accordance with the Americans with Disabilities Act (ADA).

UMA complies with all laws which define the rights of individuals with disabilities, and makes reasonable efforts to accommodate specific academic and residential needs. Students with disabilities who apply to the University are admitted through the same admissions process, and must meet the same admission standards as other students. It is the student's responsibility to request support through contact with the Division of Academic Success.

It is important to note that the laws and procedures which govern support for students with disabilities are different in college than in high school. Colleges do not offer special

education, rather they provide accommodations that enable students with disabilities to access the same education experience as their peers. An accommodation is any change in the learning environment or in the way things are customarily done that enables a person with a disability to have equitable access to the University experience.

Accommodations may vary according to the specific requirements of a course or activity; therefore, an accommodation request must be made by the student prior to each new semester, or desired participation in University sponsored events. Students are encouraged to request course accommodations as soon as they know their class schedule for the upcoming term. Accommodations may take several weeks to implement. Students who would like to contact Accessibility Services should email umasuccess@maine.edu and can find out more about the accommodation process at this link: <https://www.uma.edu/academics/student-support/accessibility-services/accommodation-process/>

7. documentation of the university's approval process, including letters of support from the university president and provost.

See attachments from USM, UMF, UMM, and UMPI. Note from UM is pending.

8. Pro Forma statement (maintained by the VCASA office)

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APPENDIX A
UMA EDUCATION FACULTY CURRICULUM VITA

Leigh Reagan Alley, Ed.D.

Leigh Reagan Alley | Ed.D.

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Education

CEEL, Early Education Leadership – Harvard Graduate School of Education; Cambridge, MA (2021)

Edd, Transformative Leadership – University of New England; Biddeford, ME (2016)

Dissertation: *Community: Collaboration for Leadership and Professional Learning in Rural Northern New England*

CAGS, Literacy K-12 – University of New England; Biddeford, ME (2012)

CAGS, Advanced Educational Leadership – University of New England; Biddeford, ME (2010)

MSEd, Instruction – Saint Joseph's College; Standish, ME (2007) Thesis: *Making Change: Promoting Democracy Through Purposeful Literacy Instruction in a De-Track High School English Classroom*

BA, English & Writing, *summa cum laude* – University of Maine at Machias; Machias, ME (2002)

Employment

- Executive Director and Chief Operating Officer, Maine ASCD, Topsham, ME (2017-

Present)

- Assistant Professor of Education, University of Maine at Augusta, Augusta, ME (Present)
- Curriculum Coach, Calais School Department, Calais, ME (2016-2021)
- Consultant, Leigh Alley: Literacy, Jonesport, ME (2009-2021)
- Adjunct Faculty, University of Maine at Augusta, Augusta, ME (2018-2021)
- Leadership Strategist, GEAR UP Maine, Syntiro, Readfield, ME (2014-2017)
- Regional Facilitator, GEAR UP Maine, Syntiro, Readfield, ME (2014-2017)
- Executive Director, Washington County Consortium for School Improvement, Machias, ME (2012-2014)
- Literacy/Instructional Strategist, Washington County Consortium for School Improvement (2009-2014)
- Project Director, Title IID Technology Grant, Maine Department of Education (2009-2011)
- English Teacher, Jonesport-Beals High School, Jonesport, ME (2002-2009)

Other Experience

- Faculty Senate, University of Maine at Augusta (Present)
- Colloquium Committee, University of Maine at Augusta (Present)
- Faculty Senate Constitution Committee, University of Maine at Augusta (Present)
- Early College Committee, University of Maine at Augusta (Present)
- Curriculum Committee, University of Maine at Augusta (Present)
- President, University of Maine at Machias Alumni Association (Present)
- Curriculum Committee, Sunrise Senior College, University of Maine at Machias (Present)

- Steering Committee, Educational Leadership Editorial Themes (Present)
- Review Board, ASCD Affiliate Development Continuum (Present)
- Review Board, ASCD Emerging Leaders (Present)
- Review Board, ASCD Handbooks Committee (2021-Present)
- Review Board, ASCD Conference Proposals (2021-Present)
- Publisher, *Journal of Maine Education* (2017-Present)
- Advisory Council, Institute for Humane Education (2019-Present)
- Review Board, ASCD Manuscript Acquisitions (2017-Present)
- Board of Editors, *Journal of Maine Education* (2013-Present)
- Vice President, Maine ASCD (2016-2017)
- Board of Directors, Maine ASCD (2011-2016)
- Steering Committee, Maine Shared Youth Vision Council (2012-2014)
- Steering Committee, Maine Content Literacy Project (2009-2014)
- President & Chief Negotiator, Moosabec Teachers Association (2007-2009)
- President, JHS/JBHS Alumni Association; (1999-2019)

Recent Awards and Recognitions

- 2023 Golden Wizard Book Prize
- 2023 Purple Dragonfly Book Awards, First Prize: School Issues
- 2023 Purple Dragonfly Book Awards, Honor: Best New Author
- 2023 Readers' Favorite Five-Star Review
- 2023 Wishing Self Five-Star Review
- 2023 #1 New Release, Amazon.com, Children's Books—Peer Pressure
- 2023 #1 Best Seller, Amazon.com, Children's Books—Mindfulness

- 2023 Commencement Address, University of Maine at Machias
- 2023 Faculty Speaker—Convocation, University of Maine at Augusta
- 2021 ASCD Affiliate Honor for Overall Excellence
- 2020 Finalist Nominee, National Assessment Governing Board, responsible for The Nation's Report Card
- 2020 ASCD Affiliate Honor for Excellence in Professional Learning
- 2020 University of Maine at Machias Distinguished Young Alumnus

University Courses Taught:

- EDU 160 / HUS 160—Perspectives on Infants, Toddlers, and Young Children
- EDU 251—The Teaching Process
- EDU 295—Social-Emotional Learning: Core Competencies—*Course Creator*
- EDU 327—Mathematics for Young Children
- EDU 328 / HUS 328—Creative Development and Art for Young Children
- EDU 330—Teaching Writing in the Early Elementary Grades PK-3—*Course Developer*
- EDU 344E—Self-Care and Resilience for Educators—*Course Creator*
- EDU 351W—Teaching Reading in Elementary School
- EDU 363—Young Children with Special Needs
- EDU 366 / ENG 366—Children's & Young Adult Literature
- EDU 379—Trauma-Sensitive Classrooms—*Course Creator*
- EDU 385—Methods of Teaching Reading and Writing in the Content Areas
- EDU 390B—Methods of Teaching English (7-12)
- EDU 390G—Methods of Teaching Social Studies (7-12)
- EDU 399—Student Teaching Seminar

- Other Courses Designed and Not Yet Taught (for the SEL Post-Baccalaureate Certificate and the MAT in Whole Child Education):
 - EDU 530—The Whole Child
 - EDU 540—The Whole Educator
 - EDU 550—Whole School, Whole Community, Whole Child
 - EDU 580—The Just-Right Challenge
 - EDU 510—Restorative Practice

Representative Publications and Presentations

Alley, L. R. (2023). *Starr of the Show*. Piggy Bank Press.

Alley, L.R., Drewette-Card, M., & Bellavance, M. (2023, October). *Whole student teaching and learning* [Conference presentation]. ACTEM Annual Conference, Augusta, ME.

Alley, L.R., Drewette-Card, M., & Bellavance, M. (2023, August). *Supporting Maine educators to achieve whole student learning anywhere/anytime* [Conference presentation]. Maine Educator Summit, Augusta, ME.

Dean, C., Surette, T., Stark, L., **Alley, L.R.,** & Bentley, C. (2022, December). *Retooling traditional field placements: A residency model* [Conference presentation]. Educate Maine Symposium, Portland, ME.

Alley, L.R., & Drewette-Card, M. (2022, October). *Whole learner education in a pandemic world* [Conference presentation]. ACTEM Annual Conference, Augusta, ME.

Alley, L.R. (2022, June). *A whole student approach*. [Conference presentation]. 109th Annual Commissioner's Conference for Superintendents, Bar Harbor, ME.

Alley, L.R. (2022, March). *Using SEL and the ZPD to help learners go with the flow*

[Conference presentation]. Penobscot River Educational Partnership Conference, Virtual.

Alley, L.R., & Surette, T.N. (2021, March). *SEL approaches to supporting students experiencing adverse circumstances, including the ongoing COVID-19 pandemic* [Conference presentation]. Penobscot River Educational Partnership Conference, Virtual.

Alley, L.R. (Host). (2020, November 14). *Tips for remote teaching* [Audio podcast episode]. In *Maine ASCD: The Podcast*.

Alley, L.R. (Host). (2020, October 29). *Putting the ME in ASCD* [Audio podcast episode]. In *Maine ASCD: The Podcast*.

Alley, L.R. (Host). (2020, April 7). *What Maine's curriculum leader of the year wishes people knew about public education in America* [Audio podcast episode]. In *Maine ASCD: The Podcast*.

Alley, L.R., & Drewette-Card, M. (2020, March). *Educating the whole child: Whole schools and whole communities partnering to ensure equity* [Conference presentation]. School Redesign in Action Conference, Norwood, MA. (Conference canceled)

Alley, L.R. (Host). (2020, January 13). *Challenge and engagement* [Audio podcast episode]. In *Maine ASCD: The Podcast*.

Alley, L.R. (Host). (2019, December 26). *Humane education and the whole child* [Audio podcast episode]. In *Maine ASCD: The Podcast*.

Alley, L.R. (Host). (2019, December 11). *Empathy and kindness: The whole educator*. [Audio podcast episode]. In *Maine ASCD: The Podcast*.

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support students with adverse childhood experiences [Conference presentation]. Maine Education Association Fall Conference, Hampden, ME.

Alley, L.R. (2019, October). *It's contagious (no, really!): Catching the kindness bug K-6* [Conference presentation]. Maine Education Association Fall Conference, Hampden, ME.

Alley, L.R. (2019, October). *Become a whole child certified educator!* [Conference presentation]. ACTEM Annual Conference, Augusta, ME.

Alley, L.R., & Drewette-Card, M. (Hosts). (2019, June 14). *Helping communities through the whole child approach* [Audio podcast episode]. In *Maine Education Matters*.

Alley, L.R. (2019, April). *SEL and the whole child approach to learning* [Conference presentation]. Social-Emotional Learning Summit, Biddeford, ME.

Alley, L.R. (2019, April). *Vision meets action: Whole schools and whole communities partnering*

to educate the whole child [Conference presentation]. Maine Education Association Spring Conference, Farmington, ME.

Alley, L.R. (2018, June). *Public education in Maine: A street-level view* [Keynote]. Institute for Humane Education (IHE) Annual Learning Session, Portland, ME.

Alley, L.R. (2017, September). *Connecting rural college access programs* [Conference presentation]. National College Access Network (NCAN) Annual Conference, San Diego, CA.

Alley, L.R. (2017, August). *Ensuring equity: The whole child approach in Maine* [Conference presentation]. Elevating and Celebrating Effective Teaching and Teachers (ECET2) Convening, Waterville, ME.

- Alley, L.R.** (2017, July). *Social networking speed date: Connecting rural GEAR UP programs* [Conference presentation]. National Council for Community and Education Partnerships (NCCEP) Annual Conference, San Francisco, CA.
- Alley, L.R.** (2017, May). *Habits of mind: growing the mindset to move Maine forward* [Conference presentation]. Maine College Access Network Annual Conference, Augusta, ME.
- Alley, L.R.** (2016, December). *The whole child approach in Maine: Ensuring Maine students are healthy, safe, engaged, supported, and challenged* [Conference presentation]. Educate Maine Symposium, Portland, ME.
- Alley, L.R.** (2016, July). *Transformational change through school-based pilot studies* [Conference presentation]. National Council for Community and Education Partnerships (NCCEP) Annual Conference Washington, DC.
- Alley, L.R.** (2016). *Community: Collaboration for leadership and professional learning in rural northern New England* [Doctoral dissertation, University of New England].
<https://dune.une.edu/theses/52>
- Alley, L.R.** (2015, May). *I can be anything I want to be: Envisioning a future and planning backward* [Conference presentation]. Maine College Access Network (MaineCAN) Spring Conference, Waterville, ME.
- Alley, L.R.** (2015, July). *Take your team from forming to performing with a minimum of storming* [Conference presentation]. National Council for Community and Education Partnerships (NCCEP) Annual Conference San Francisco, CA.
- Alley, L.R.** (2010, August). *Writing across the curriculum* [Institute intensive]. Maine Reading First Annual Summer Literacy Institute, Orono, ME.
- Alley, L.R.** (2010, August). *K-6 collaborative routines* [Institute intensive]. Maine Reading First Annual Summer Literacy Institute, Orono, ME.
- Alley, L.R.** (2009, September). *The intersect of literacy and college readiness* [Keynote]. Great Maine Schools Summit, Machias, ME.

Expertise

- Leadership
- Social-Emotional Learning
- Trauma-Sensitive Practice
- Whole Child Education
- Solutionary Education
- Equity
- Continuous Improvement
- Grant Management
- Networking
- Mentoring and Professional Coaching
- Curriculum and Instruction
- Proficiency-Based Education
- Distance Education
- Asynchronous Education
- Literacy
- Instructional Technology

Professional Memberships

- National Council for Community and Education Partnerships
- National College Access Network
- ASCD Affiliate Leaders Network
- ASCD
- New England Educational Opportunity Association
- Maine ASCD
- Maine Educational Opportunity Association
- Maine College Access Network
- Maine Association for Improving Literacy (MAIL) Network
- Washington County Leadership Team
- Maine Writers and Publishers Alliance

References

Shannon Shanning
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 Topsham, Maine
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Zoe Weil
 Co-Founder & President
 Institute for Humane Education
 Surry, Maine
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 (207) 667-1025

Matthew Drewette-Card
 Immediate Past President
 Maine ASCD
 Topsham, Maine
mdrewette-card@aos94.org

(207) 319-9267

Cynthia D. Dean, Ed.D.

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Home
124 Lampson Road
Liberty, ME 04949
207.542.9481 (cell)

Current Positions

- 2023 Professor of Education, University of Maine at Augusta
- 2016-2023 Associate Professor of Education, University of Maine at Augusta
- 2011-2016 Assistant Professor of Education, University of Maine at Augusta
- 2011-present Coordinator of Teacher Education, University of Maine at Augusta

Academic History

- 2010 Ed.D., University of Maine. Special field: Literacy Education
 Dissertation: Dean, C. (2010). The ecology of peer tutoring: Perspectives of student staff in one high school writing center, University of Maine.
- 2005 M.Ed., University of Maine. Special field: Literacy Education
- 2000 M.A., University of Maine. Major emphasis: English with a concentration in Women's Studies. Masters Thesis: Dean, C. (2000). Breaking out: The power of song in Louisa May Alcott's *Little Women* and selected short stories, University of Maine.
- 1998 B.A., University of Maine at Augusta, Major emphasis: English

Employment History

Secondary Teaching

- 2006- 2011 Literacy Specialist and Learning Center Director, Erskine Academy, So. China, ME
- 2006-2011 Writing Center Director, Erskine Academy, So. China, ME.
- 2001-2011 English Teacher (9-10), Erskine Academy, So. China, ME.

2000-2001 English Teacher (9-12), Lee Academy, Lee, ME.

Post-secondary Teaching

2023 Professor of Education, College of Arts and Sciences,
University of Maine at Augusta, Augusta, Me.

2016-2023 Associate Professor of Education, College of Arts and Sciences,
University of Maine at Augusta, Augusta, Me.

2011-2016 Assistant Professor of Education, College of Arts and Sciences,
University of Maine at Augusta, Augusta, Me.

2005-2008 Instructor, College of Education and Human Development, University of
Maine, Orono, Me.

2001 - 2006 Instructor, Composition, College of Liberal Arts and Sciences,
University
of Maine, Orono, Me.

1999-2000 Instructor, Composition, University of Maine at Augusta, Augusta, ME.

Graduate Assistantship

1998-2000 Teaching Assistant in Composition (full responsibility), Department of
English, College of Liberal Arts and Sciences, University of Maine, Orono, ME.

Adult Education

2005 English Instructor, Transitions to College, Adult Education, MSAD#5,
Rockland, ME.

Honors and Awards

Teaching

- 2012 Baker Scholar, Maine Writing Project.
- 2011 John Schmitt Award for Outstanding Research at the Graduate Level
- 2003 Teacher of the Trimester, Erskine Academy
- 2000 Outstanding Graduate Student in English, University of Maine

Achievement

- 2014 Meritorious Achievement Award, Faculty, University of Maine at Augusta
- 2007 National Board Certification in English Language Arts 14-18 years old

Grants and Fellowships

- 2015 Presidential Mini-Grant. Education Technician Certificate of Study. Co-awarded to Patricia Clark
- 2015 Research Grant, Education Technicians in Maine, Co-awarded to Patricia Clark.
- 2011 Presidential Mini-Grant. Interdisciplinary Student Conference.

Research

- 2022 Principal Investigator. Program review: Culturally responsive teaching, assessment, and MDOE recommendations. Co-investigators: T. Surrette, L. Stark, L. Alley
- 2015-17 Understanding the needs for education of paraprofessionals. Case study of educational technicians and special education directors to better understand the courses that both constituencies believe would support ongoing professional development for Maine's educational technicians. Co-investigators, Patricia Clark and Timothy Surrette
- 2015 Becoming a teacher: Building a teacher identity. Case study of select UMA students enrolled in EDU 380 and EDU 390.
- 2013 Building a student teaching practicum, Secondary Education. Presidential Strategic Development Fund Grant

Publications

- Dean C. (2022). "[Unpacking cultural competence.](#)" *Northwords*. Portland, Me: MCELA.
- Dean, C. (2022). "[Reaching and teaching students in poverty: Strategies for erasing the opportunity gap book review.](#)" *Journal of Maine Education* (36), 52-56
- Dean, C., Pease, K., Kruger, D., Bentley, C., Brown, A. (2021). "[Fostering engagement and building relationships: Perspectives from ELA teacher candidates.](#)" *Northwords*. Portland, Me: MCELA.
- Dean, C. (2015). *The wild dog of Caucomagomac and others: The lost stories of Charles Boardman Hawes*. So. China, ME: Sam Teddy Publishing.
- Dean, C. (2014). *The ecology of peer tutoring: Perspectives of student staff in one high school writing center*. Saarbrücken, Germany: Lambert Academic Publishing.
- Dean, C. and Doucette, R. (2015). A tale of two teachers: Mentoring new teachers. *Maine Writes*. Orono, ME: Maine Writing Project.
- Dean, C. (2011) Revising and rewriting roles: Exploring the challenges of peer tutors in a student-staffed high school writing center. In D. Fels & J. Wells (Eds.), *The successful high school writing center: Building*

the best program with your students. New York: Teachers College Press.

Dean, C. (2010) [Review of the book *Noise from the writing center*, by Elizabeth Boquet. National Writing Project website. <http://www.nwp.org/cs/public/print/resource/3353>

Institutional Documents

- 2019 Self-study for MDOE accreditation process (co-authored with Surrette, T. and Clark, P.)
- 2019 Electronic exhibit room for MDOE accreditation process (co-authored with Surrette, T. and Clark, P.)
- 2019- 2021 Senate report on Early College from Early College Oversight Committee
- 2018 Proposal for Academic Programs of the Future
- 2017 Rationale for a degree program in Education at UMA

Departmental Documents

- 2022 UMA Education Culturally Responsive Teaching Visioning Statement (in collaboration with education faculty)
- 2022 UMA Education Revised Teacher Dispositions (in collaboration with education faculty)
- 2020 UMA Education Department Curriculum Sequence Guides
- 2018 UMA Education Policies and Expectations
- 2018 UMA Education Student Contract for Admission
- 2018 UMA Teacher Preparation Community Blackboard site (revised yearly)
- 2018 UMA Teacher Education Conceptual Framework (revised)
- 2017 UMA Education Department Assessment Plan
- 2017 UMA Education Department Retention Plan
- 2017 Education Student Handbook (revised yearly)
- 2014 Student Teacher Handbook (revised yearly)
- 2014 UMA Teacher Preparation Conceptual Framework

Presentations

National

Dean, C. (2012). Writing together: The power and potential of high school writing centers. Invited workshop presenter at Illinois Teachers of English Conference, Bloomington-Normal, IL.

Dean, C., Taylor, I., Carlough, S., Krol, K., Wendlar, R. (2011). From teachers teaching teachers to tutors tutoring tutors: National Writing Project principles in high school writing centers. Invited workshop presenter at the National Council of Teachers of English Annual Convention, Chicago, IL.

Dean, C. and Wells, J. (2010). Secondary School Writing Centers. Invited guest for National Writing Project Radio.

http://www.blogtalkradio.com/nwp_radio/2010/10/28/teachers-and-writers-together-a-look-at-student-staffed-writing-centers

Dean, C., Wells, J., Patmon, D., Abercrombie, D., and Damron, R., (2010). K-12 Writing Centers: Transforming students, schools, and sites. Invited workshop presenter at the annual meeting of the National Writing Project, Orlando, FL.

Dean, C, Liepold, R. and Wells, J. (2010). Students leading the way: Peer tutors' perceptions of the transformative effects of peer tutoring in high school writing centers. Invited workshop presenter at the National Council of Teachers of English Annual Convention, Orlando, FL.

Regional

Dean, C., Alley, L., Stark, L., Surette, T. & Bentley, C. (2022). Retooling Traditional Field Placements: A Residency Model. Educate Maine, Portland, ME.

Dean, C. & Surette, T. (2019). Increase student engagement using Zoom. ACTEM Conference, Augusta,, ME

Dean, C. & Surette, T. (2019). Exploring the academic and professional needs of Educational Technicians in Maine. MEA Learning and Leading Conference. Hampden. ME.

Dean, C., Surette, T., and Clark, P. (2018). Exploring the academic and professional needs of Educational Technicians in Maine. New England Educational Research Organization Annual Conference, Portsmouth, N.H.

Dean, C. (2016). The Power of Student-Staffed Writing Centers. Maine Writing Projects Annual Conference. Augusta, ME.

Dean, C. and Maloney, P. (2015). Reading and Writing about the Environment: Project Learning Tree and the ELA classroom. Invited presenter. MCELA spring conference, Northport, ME.

Dean, C., Burnes, P. and Carlson, B. (2015). Pragmatic Professionalism: Figuring out the Day-to-Day Implications of National Directives. Invited presenter. MCELA spring conference, Northport, ME.

Dean, C., Doucette, R., Brassil, C., (2015). Achieving National Board Certification. Invited presenter, MCELA spring conference. Northport, ME.

Dean, C. (2013). DRTA: Scaffolding reading comprehension. Invited presenter. Celebrating Children's Literature Conference, Brewer, ME.

Dean, C., Elliot, K., and Kitchin, R. (2012) Starting to invest in e-portfolios as a course element. Invited presenter. New England Sloan-C Conference, Portland, ME.

Dean, C. (2012). Writing together: The power and potential of high school writing centers. Invited presenter, Maine Writing Project Summer Institute, Orono, ME.

Dean, C., Brassil, C., and McKay, M. (2012). From vision to practice: Educational leadership and common purposes among the disciples. Invited member of panel presentation. MCELA spring conference, Northport, ME.

Dean, C. (2012). Writing together: The power and potential of high school writing centers. Invited presenter. Writing really matters: It's not just another learning result. Navigating the Real World . Augusta Civic Center, Augusta, ME.

Dean, C. (2011). Fostering critical reading and thinking. Invited presenter. Maine Maritime Academy, Castine, ME

Dean, C. (2011). The ecology of peer tutoring: Perspectives of student staff in one high school writing center. Paper presentation. New England Educational Research Organization Conference. New. Bedford, MA.

Dean, C. and Burnes, P. (2011). Unpacking the framework for post-secondary success. Invited workshop presenter at the MCELA spring conference, Northport, ME.

Dean, C. (2010). Peer tutor training. Invited workshop presenter for the Maine Writing Project's Annual Secondary School Writing Center Conference. University of Maine, Orono, ME.

Dean, C. (2010). Literacy-based assessments. Invited workshop presenter for the University of Maine's Department of Forestry connection to high school program. Bowdoin College, Brunswick, ME.

Dean, C. (2010). Understanding google applications for education. Invited workshop presenter at the MCELA spring conference, Bath, ME.

Institutional and Local

Hill, M. *, Wallace, J. *, Meserve, M. *, Kenny, J. *, Surette, T., Dean, C., & Miller, A. (May, 2019). Using the ZOOM videoconference tool to increase student engagement in online courses and degree programs. Accepted at *2019 Faculty Institute*, Augusta, ME.

* students

Dean, C., Hudzina, M., and LeBlanc, G. (2013). Celebrate education week: The smartest kids in the world. University of Maine at Augusta, Augusta, ME.

Dean, C. (2010). Navigating the doctoral program. Invited speaker for ERL 590, Pro Seminar II, University of Maine, Orono, ME.

Dean, C. (2010). Google apps for education. Invited presenter, Erskine Academy, So. China, ME.

Professional Activities

- 2023 Representative of UMS Deans and Directors at State Board of Education Higher Ed and Certification Committee meeting June/October 2023
- 2023 Invited guest – State Board of Education retreat, USM. August 15.
- 2022-present UMS Deans and Directors (This is a group that had its origins in the APRIP process)
- 2023 Member, TeamE (all Maine educator preparation programs)
- 2022 Reviewer, Mandinach, E., book proposal *Culturally Responsive Data Literacy: An Important Equity Construct for All Educators*. Rowan & Littlefield
- 2020 Reviewer, NEERO conference proposals
- 2020-21 Member, MDOE Chapter 115 Revision Consensus Committee
- 2021-present Member, State of Maine Professional Standards Board
- 2018-present Vice President, AFUM Augusta chapter
- 2018-present Member AFUM Executive Committee
- 2017-18 Reviewer, NEERO conference proposals
- 2016 Co-facilitator, Book study group for MCELA, *The Power of Grammar* by Vicki Vinton and Mary Ehrenworth
- 2015 Co-facilitator, Book study group for Maine Writing Project, *Minds Made for Stories* by Tom Newkirk.
- 2015 Member, Dissertation Committee. Anne Miller, University of Maine.
- 2015- present Post-secondary liaison to Kennebec Valley Superintendents Association
- 2014-15 Sponsor, Maine Department of Education Cross Discipline Literacy Dine and Discuss. UMA. October 22 and March 12.
- 2014 Reviewer for Pearson, *Foundations of education: Becoming effective teachers in challenging times*. November.
- 2014 Attendee, National Council of Teachers of English Annual Convention, Washington, DC. November 19-22.
- 2014 Facilitator, MCELA Dine and Discuss. Smarter Balance Assessment. United Technical Center. Bangor, ME. October 15.
- 2014-15 Sponsor, Maine Department of Education Cross Discipline Literacy Dine and Discuss. UMA. October 22 and March 12.
- 2014 Sponsor, Maine Writing Projects “Write Now, Write Tech” conference. UMA. November.

- 2013-14 Sponsor, Maine Department of Education Cross Discipline Literacy Dine and Discuss. UMA. November 6 and March 5.
- 2013 Attendee, National Council of Teachers of English Annual Convention, Boston, MA. November 22-24
- 2013 Member, Dissertation Committee. Anita Jerosch, University of Maine.
- 2013 Attendee, Promising Practices Conference. Maine Writing Project. Orono, ME. July 11.
- 2013 Representative for Maine Council for English Language Arts, Annual Affiliate Meeting, Atlanta, GA. July 12-14.
- 2013 Member, Maine State Literacy Team sub-committee, Recommendations for certification changes.
- 2013 Attendee, Governor's Conference on Education, Augusta, ME. March 22.
- 2013 Attendee, Southern Maine Writing Project Technology Conference. Portland, ME. March 1.
- 2013-2020 Member, Maine Department of Education Literacy Faculty Group.
- 2013-2020 Representative for UMA education. Kennebec Valley Superintendents Association.
- 2012 Attendee, National Council of Teachers of English Annual Convention, Las Vegas, NV. November 15-19.
- 2012 Facilitator, Literacy for ME launch and regional meetings, Augusta and Lewiston, ME. September 2012
- 2012 Member, Maine State Literacy Team delegation to Striving Readers Conference, Anaheim, CA. July 29-Aug 2
- 2012 Facilitator, Maine State Literacy Team Critical Friends meeting, Waterville, ME. June 22.
- 2012 Attendee, New England Educational Research Organization Annual Conference, Portsmouth, NH. May 2-4.
- 2012 Attendee, Common Core State Standards Summit, Orono, ME. April 25.
- 2012 Member, Passage review committee for Maine PAAP (Personalized Alternative Assessment Portfolio), Augusta, ME.
- 2012 Member, Maine State Literacy Team delegation to Striving Readers Seminar, Chicago, IL. March 5-8.

- 2012 Member, Steering Committee for Project Learning Tree, Maine chapter.
- 2011 Coordinator, Maine High School Writing Centers Annual Conference, Augusta, ME. Also coordinated this conference in fall 2010 (Orono) and spring 2011 (So. China, ME)
- 2011 Member, Standing Committee on Secondary School Writing Centers, International Writing Centers Association
- 2011 Maine Writing Project Representative, National Writing Project Annual Spring Meeting (Meetings with congressional delegation), Washington, D.C.
- 2010 Member, Maine Department of Education Literacy Team, Augusta, ME
- 2010 External reviewer, English program, University of Maine at Augusta, Augusta, ME.

University and Departmental Activities

- 2022 Chair, Search committee for EDU adjuncts
- 2020 Facilitated a system wide license for The Teaching Channel that continues to date.
- 2022 University supervisor for three student teachers: social studies Richmond High School, English Hall-Dale High School, and elementary education Camden-Rockport Middle School.
- 2021 Member, Search Committee for Assistant Professor of Education/Field Placement Director for Teacher Education Program
- 2021-present President, UMA Faculty Senate
- 2021-present Member, President's Cabinet
- 2021-present Member, UMS Faculty Governance Council
- 2021 fall University supervisor for art student teacher at Prescott Memorial School and English student teacher at Oceanside High School
- 2020 Chair, Search Committee for Field Placement, Certification, and Assessment director for Teacher Education Program
- 2019 Member, Search Committee for Administrative Specialist for Academic Programs of the Future program
- 2019 Member, Search Committee for Director of Instructional Services
- 2019 Collaboration with MARCOM to develop EDU brochure, conceptual framework graphic, and revision of website to include an internal (portal-based) informational website for matriculated EDU students.

2019 Outreach presentation for UMA EDU current and perspective students at the UMA centers at Saco and South Paris

2019 Presentation to Mid-Coast Superintendents Association on UMA Education Program and Early College opportunities for Computer Science

2019 Facilitator for transfer agreements between UMA and KVCC, EMCC, WCCC & SMCC

2019 University Supervisor for two students (English – Biddeford High School & Social Studies – Oxford Comprehensive High School)

2019 Faculty representative at UMA centers/UMA student retreat

2018 Outreach presentation for perspective EDU students at CMCC

2018 Course developer for EDU 200 Diversity, Poverty, and Cultural Competence

2018 Course developer for EDU 345 Child Development

2018 Course developer for EDU 215, 216, & 217 Field Experience I, II & III

2018 Faculty representative at UC/UMA student retreat (March 30-31).

2018 Member, UMA faculty task force for feedback on UM policy 214.

2018 Member, University College and UMA reintegration committee on student services.

2018- 2021 Chair, Early College Oversight Committee.

2018 Course developer for EDU 330 Teaching Writing in the Early Elementary Grades PK-3

2018 Course developer for EDU 385 Methods of Teaching Reading and Writing in the Content Areas (redesigned from Teaching Writing in the Content Areas)

2018 spring University Supervisor for two student teachers in social studies at Oceanside High School.

2017 Coordinator for Taskstream assessment system

2017 Facilitator for transfer agreements between UMA and WCCC and EMCC

2017 fall University Supervisor for four student teachers: two English teachers, Thornton Academy and Boothbay Regional High School; two social studies teachers, Messalonskee Middle School and Gardiner Area High School

2017 Course developer for EDU 100 Introduction to Teacher Education at UMA

2017 fall Instituted admission process for new EDU students including submission of

	intent to declare form and admission meeting with coordinator
2017 spring	University Supervisor for one student teacher in English, Mt. Ararat High School
2016 fall	University Supervisor for two student teachers: one art teacher, Camden Hills High School/Medomak Valley High School; one English teacher, Belfast Area High School/Troy Howard Middle School
2016 spring	University Supervisor for four student teachers: two life science teachers, Belfast Area High School and Camden Hills High School/Oceanside High School; one health teacher, Oak Hill High School; one English Teacher, Bath Middle School
2015	Course developer for EDU 385 Teaching Writing in the Content Areas (6-12).
2015 fall	University Supervisor for one student teacher in Life Sciences, Morse High School.
2015	Developer, Minor in Elementary Education and Minor in Early Elementary Education.
2015	Course developer, EDU300 Teacher as Researcher and EDU 210 Teaching the Dimensions of Literacy.
2015-18	Co-chair, Bridge Program Faculty Oversight Committee.
	2015-present Member, Program Integration committee. Education sub-team. UMS system.
2015 Spring	University Supervisor for one student teacher in English, Portland High School.
2014-15	Chair, Search Committee for Education Faculty.
2014-15	Member, Search Committee for Accounting Faculty.
2014 Fall	University Supervisor for five student teachers -two English teachers, Mardi Stevens Learning Center and Brunswick Junior High School; three social studies teachers- Morse High School, Middle Schools of the Kennebunks, Lewiston High School, and Lewiston Middle School
2014 Spring	University Supervisor for two art student teachers, Messalonskee High School and Poland Regional High School
2013	Member, Search Committee for Staff Associate – Career and Advising
2013 & 2014	Advising Forum for Education Students
2013 & 2014	Course developer, EDU 381 Teaching Mathematics in Elementary School.

- 2013-15 Chair, Teacher Certification Advisory Group
- 2013 Course developer, EDU 361 Teaching Science in Elementary School, EDU 351 Teaching Reading in Elementary School, EDU 371 Teaching Science in Elementary School
- 2013 Member, NEASC Self-Study for Students. Standard six.
- 2013 University Supervisor for ELA student teacher, Gardiner Area High School
- 2013 Member, Committee for Interdisciplinary Student Conference
- 2013 Faculty representative for College of Arts and Sciences, Provost's Committee for Distinguished Student and Woodworth award recipients
- 2012 Education representative. UMA Admissions luncheon for high school guidance counselors.
- 2012-2018
2019- 2020 Member, Faculty Senate
- 2012 Participant, ABCDE committee survey
- 2012-14 Member, Search Committee for English/Writing Center faculty.
- 2012-2014 Member, Colloquium Committee and Academic Theme Conference Committee
- 2012 Student Concierge Committee
- 2011-12 Developer, Minor in Secondary Education and Certificate of Study in Secondary Education.
- 2011-12 Course Developer, EDU 250 Foundations of Education, EDU 380 Literacy and Technology Across the Curriculum, EDU 390 Methods of Secondary Teaching, EDU 366 Children's and Young Adult Literature, EDU 387 Teaching the Exceptional Child in the Regular Classroom.
- 2011- present Member, Honors Council.
- 2011 Member, Search Committee for Mathematics Faculty
- 2011-2020 Member, Interdisciplinary Council

University Courses Taught

Undergraduate

EDU 100 Introduction to Teacher Education, University of Maine at Augusta (Zoom with delayed viewing)
 EDU 200 Diversity, Poverty, and Cultural Competence (Zoom with delayed viewing)
 EDU 215, 216, & 217 Field Experience I, II, & III (Zoom)
 EDU 250 Foundations of Education, University of Maine at Augusta (online)
 EDU 210 Dimensions of Literacy, University of Maine at Augusta (online)
 EDU 300 Teacher as Researcher, University of Maine at Augusta (hybrid)
 EDU 345 Child Development (online)
 EDU 362 Language and Literacy, University of Maine at Augusta (hybrid)
 EDU 380 Digital Literacy and Technology in Schools (formerly Literacy and Technology Across the Curriculum), University of Maine at Augusta (online)
 EDU 385 Teaching Writing in the Content Areas, University of Maine at Augusta (VC)
 EDU 385 Methods of Teaching Reading and Writing in the Content Areas (redesigned course) University of Maine at Augusta (online)
 EDU 387 Teaching the Exceptional Child, University of Maine at Augusta (online)
 EDU 366 Children's and Young Adult Literature (online)
 EDU/PSY 401 Educational Psychology (online)
 EDU 390 Secondary Methods of Teaching, University of Maine at Augusta (online)
 EDU 399 Student Teaching Seminar
 ENG 101 College Composition, University of Maine (Hutchinson Center, Belfast, ME.)
 ENG 101 College Writing, University of Maine at Augusta (Thomaston Center, Thomaston, ME.)

Graduate

Writing Center Pedagogy (summer 2013, online)
 Special Topics in Literacy: Digital Literacies (Central Maine literacy cohort)
 Writing Process (Central Maine literacy cohort)
 Literacy Across the Curriculum (on-campus)
 Teaching Young Adult Literature (on-campus)
 Mentoring in the Maine Writing Project Summer Institute (on-campus)
 Adolescent Literacy Institute (on-campus)
 Maine Writing Project Summer Institute (on-campus)

Secondary School Courses Taught

World Literature
 Shakespeare
 British Literature
 American Literature
 Freshman Writing and Literature
 Academic Literacy
 Writing Center English: Mentoring and Composition

Adult Education Courses Taught

Transitions to College English

Memberships

Association of Teacher Educators
 Teacher Educators Alliance of Maine
 National Council of Teachers of English

Association for Supervision and Curriculum Development

Timothy N. Surette
27 McKinely St.
Bangor, ME 04401
(207) 731 – 6998
timothy.surette@maine.edu

EDUCATION

12/16 Doctor of Education – Curriculum and Instruction – Teaching and Learning of School Subjects, University of Cincinnati, OH

08/07 Master of Education – Educational Leadership, University of Maine, Orono, ME

05/02 Bachelor of Science – Secondary Education, University of Maine, Orono, ME

RESEARCH INTERESTS

Teacher induction, teacher professional development, communities of practice, mentorship during student-teaching

PROFESSIONAL LICENSURES & APPOINTMENTS

02/14 – 06/19 Graduate Faculty, University of Maine, College of Education and Human Development

07/18 – 07/23 State of Maine, Professional Building Administrator, (Level K – 12)

07/18 – 07/23 State of Maine, Professional Teacher, Science – Life (Level 7 – 12)

07/18 – 07/23 State of Maine, Professional Teacher, Science – Physical (Level 7 – 12)

07/18 – 07/23 State of Maine, Professional Teacher, Social Studies (Level 7 – 12)

PROFESSIONAL EXPERIENCE

08/15 – Present Assistant Professor of Education, University of Maine at Augusta, ME

Responsibilities: I am responsible for development, delivery, and ongoing improvement of multiple course offerings related to K-12 teacher preparation, mentoring and evaluating student-teaching interns, advising of undergraduate students, and service to the community and university.

01/15 – 05/15 Adjunct Professor for *EDU 361, Teaching Science in the Elementary School*, University of Maine at Presque Isle, ME

Responsibilities: Responsible for selection of course readings, curriculum development, instruction, and assessment. This undergraduate level course placed an emphasis on examination of curriculum projects and trends in elementary science, selection and construction of teaching materials, study of selected topics in various science areas, research and use of science teaching strategies, and care and use of living and non-living science materials. This course was taught in an online setting.

01/15 – 05/15 Teaching Assistant for *Curriculum and Instruction 7001, Educational Research for Master's Students*, School of Education, University of Cincinnati, OH

Responsibilities: To respond to student questions and concerns, assess student work, provide feedback, and facilitate discussions. This graduate level course focused on research and bibliographic methods in curriculum and instruction; analytic, evaluative writing about research; use of research facilities. Students researched and wrote a literature review on a topic relevant to the field of education/curriculum and instruction. Students learned the steps for preparing a literature review and engaged in researching topics, forming arguments, and synthesizing research papers. This course was taught in an online setting.

09/14 – 05/15 Adjunct Professor for *EDB 204, The Teaching Process*, College of Education and Human Development, University of Maine, Orono, ME

Responsibilities: Responsible for selection of course readings, curriculum development, instruction, and assessment. This undergraduate level course engaged students in the examination of procedures of instructional planning, including improved use of small groups, classroom space, and appropriate teaching materials, measurement, evaluation, and reporting of pupil learning.

01/14 – 05/15 Adjunct Professor for *EDG 400, Field Experience Seminar*, College and Education and Human Development, University of Maine, Orono, ME

Responsibilities: Responsible for selection of course readings, curriculum development, instruction, and assessment. This undergraduate level course engaged students in the study of education programs through visits, consultation, and appraisal of practices in selected schools, instructional centers, clinics, laboratories, and community agencies. Observations are considered in relation to research theory and practice.

09/11 – 05/15 Graduate Assistant with the Woodrow Wilson Ohio Teaching Fellowship project at the College of Education, Criminal Justice, and Human Services, University of Cincinnati, OH

Responsibilities: Responsible for the management and continuous improvement of a comprehensive mentoring program for Woodrow Wilson Ohio Teaching Fellows that graduated from the University of Cincinnati and began teaching science, technology, or mathematics subjects at high-needs public secondary schools throughout the state of Ohio.

09/14 – 12/14 Teaching Assistant for *Curriculum and Instruction 7002: Theories and Trends in Curriculum*, School of Education, University of Cincinnati, OH Responsibilities: To respond to student questions and concerns, assess student work, provide feedback, and facilitate discussions. This graduate level course focused on how curriculum and curricular activities are developed and impacted by legislative and sociopolitical forces. The class investigated the interaction of curriculum implementation and models of instruction in respect to

student learning as well as how that curriculum is shaped. This course was taught in an online setting.

07/14 – 12/14 Adjunct Professor for *EDU 366, Teaching Mathematics in the Elementary School*, University of Maine at Presque Isle, ME

Responsibilities: Responsible for selection of course readings, curriculum development, instruction, and assessment. The intent of this undergraduate level course was to acquaint students with the foundations of teaching mathematics and to explore content, strategies, materials, organizational structure, and assessment procedures. This course was taught in an online setting.

01/14 – 05/14 Field Placement Supervisor, College of Education and Human Development, University of Maine, Orono and College of Education, University of Maine, Presque Isle

Responsibilities: To continuously communicate with and provide written and oral feedback to teacher candidates. To supervise and evaluate teacher candidate progress during their student teaching experience and advise candidates on the development of their portfolios around the UMaine Teacher Candidate Proficiencies and the Maine Beginning Teacher Standards.

01/14 – 05/14 Teaching Assistant for *Curriculum and Instruction 7010, Improving Instructional Effectiveness*, School of Education, University of Cincinnati, OH

Responsibilities: To respond to student questions and concerns, assess student work, provide feedback, and facilitate discussions. This graduate level course examined the nature of instructional effectiveness and its relationship to classroom practice. This course was taught in an online setting.

09/13 – 12/13 Adult Education Biology / Lab Instructor, Bangor School Dept., Bangor, ME

Responsibilities: Responsible for textbook selection, course development, and delivery of instruction and assessment. This introductory survey course included a laboratory component and covered topics such as: the nature of science and scientific inquiry, cell structure and function, photosynthesis, cellular respiration, DNA and genetics, evolution, ecology and classification of life forms.

06/13 – 12/13 Teaching Assistant for *Curriculum and Instruction 7003, Teaching and Learning in Diverse Classrooms*, School of Education, University of Cincinnati, OH

Responsibilities: Assisted with the planning and delivery of two sections of an online class for graduate level students at the University of Cincinnati. My responsibilities were to develop course content, respond to student questions and concerns, assess student work, provide feedback, and facilitate discussions.

09/13 – 11/13 Alternative Education Mathematics Long-Term Substitute Teacher (Grades 9-12), Bangor School Department, Bangor, ME

Responsibilities: Providing differentiated instruction and support in the subject areas of Pre-Algebra, Algebra I and II, and Geometry to multiple groups of high school level students with diverse learning abilities and styles.

01/13 – 08/13 Teaching Assistant for *Curriculum and Instruction, 7001 Master's Research Seminar*, School of Education, University of Cincinnati, OH

Responsibilities: During the spring and summer semesters of 2013, I assisted in the planning and delivery of two sections of an online class for graduate level students at the University of Cincinnati. My responsibilities were to respond to student questions and concerns, assess student work, provide feedback, and facilitate discussions.

01/13 – 08/13 Instructor for the *Learning for the Mobile Age* Teacher Professional Development

Initiative, CET Learning Services, Cincinnati, OH

Responsibilities: Assisted in the development and ongoing evaluation of a teacher professional development workshop titled *Learning for the Mobile Age*. The workshop focused on strategies for utilizing various mobile devices, such as cell phones and iPads, to support classroom instruction and student assessment in all subject areas and grade levels. Additionally, I delivered this workshop to teachers at various Cincinnati public schools in a face-to-face and online format.

03/12 – 08/13 Instructor for the *Learning for the Digital Age* Teacher Professional Development Initiative, CET Learning Services, Cincinnati, OH

Responsibilities: Assisted in the development and ongoing evaluation of a teacher professional development workshop titled *Learning for the Digital Age*. The workshop focused on how to utilize various web-based tools to engage students in the 21st century skills of collaboration, creativity, communication, and critical thinking. Additionally, I delivered this workshop to teachers at various Cincinnati public schools in a face-to-face and online format.

08/12 – 12/12 Adjunct Professor for *Curriculum and Instruction 7023, Intermediate Methods Secondary: Science*, School of Education, University of Cincinnati, OH

Responsibilities: Textbook selection, course development, instruction, and assessment. This was the second of three required methods courses for University of Cincinnati undergraduate and/or graduate students pursuing any science teaching license in the State of Ohio.

08/08 – 09/11 Assistant Principal/Athletic Director at Dr. Lewis S. Libby School (Gr. pK – 8), Milford, ME

Responsibilities: As the assistant principal, I worked collaboratively with other school leaders to hire, supervise, and evaluate professional teaching and support staff, led school wide improvement initiatives, and managed academic and behavioral student data. As the athletic director, I was responsible for the management of all aspects of the interscholastic sports program offered at the Dr. Lewis S. Libby School.

09/07 – 09/11 Adult Education Chemistry, Earth Science, and Biology Instructor, Old Town School Department, Old Town, ME

Responsibilities: Textbook selection, course development, instruction, and assessment related to multiple adult education course offerings in the sciences at Old Town High School.

07/04 – 08/08 7th and 8th Grade Science Teacher, James F. Doughty Middle School, Bangor, ME

Responsibilities: I taught 7th and 8th grade science at the James F. Doughty Middle School in Bangor, Maine. During my four years of teaching, I was responsible for the planning and administration of integrative units aligned with the Maine Learning Results in the physical and life sciences, including astronomy, chemistry, physics, and biology. Furthermore, I was involved in the analysis of student data to continually monitor and improve my classroom instruction.

03/06 – 06/08 High School Varsity Boys/Girls Tennis Coach, John Bapst Memorial High School, Bangor, ME

Responsibilities: Planning and supervising practices, communicating with the athletic director, parents and student-athletes, and coaching student-athletes during competitions.

06/07 – 08/07 Participating Teacher/Researcher, *Inquiry-Based Dynamic Earth Applications of Supercomputing (I.D.E.A.S.) project*, National Science Foundation

Responsibilities: Engagement in ongoing research being conducted at the University of Maine that focused on utilizing computer models to understand fundamental Earth processes such as climate change, plate tectonics, and ocean circulation. Additionally, I developed curricular units connected to the IDEAS project's learning goals and delivered them to my middle school science students during the 2007 - 2008 academic school year.

06/06 – 08/06 Participating Teacher/Researcher, *Forest Bio-refinery Research Initiative (F.B.R.I.) project*, National Science Foundation

Responsibilities: Engagement in ongoing research being conducted at the Forest Bioproducts Research Institute – University of Maine. The research focused on the viability of forest-based bioproducts as a sustainable commercial energy resource. Additionally, I developed curricular units connected to the FBRI project's learning goals and delivered them to my middle school science students during the 2006 - 2007 academic school year.

06/05 – 08/05 Participating Teacher/Researcher, *Maine, GK-12 Sensors!*, National Science Foundation

Responsibilities: Engagement in ongoing research being conducted at the University of Maine that focused on the usability of several types of industrial sensors. Also, I developed curricular units connected to the Maine, GK-12 Sensors! Project's learning goals and delivered them to my middle school science students during the 2005 - 2006 academic school year.

01/04 – 07/04 9th – 12th Grade Science Teacher, Old Town High School, Old Town, ME

Responsibilities: Course development and delivery of Biology, Wildlife Ecology, and Anatomy and Physiology.

07/03 – 01/04 9th – 12th Grade Science Teacher at Mattanawcook Academy, Lincoln, ME

Responsibilities: Course development and delivery of Earth Science, Environmental Science, and Physical Science.

03/02 – 06/03 High School Varsity Girls Tennis Coach, Bangor High School, Bangor, ME

Responsibilities: Planning and supervising practices, communicating with the athletic director, parents and student-athletes, and coaching student-athletes during competitions.

PUBLICATIONS

Peer-Reviewed Publications:

Surette, T. (2020). Influence of mentoring and professional communities on the professional development of a cohort of early career mathematics and science teachers. *School Science and Mathematics* 120(3), 175 – 188.

Surette, T. & Johnson, C. (2015). Assessing the ability of an online environment to facilitate the critical features of teacher professional development. *School Science and Mathematics*, 115(6), 260 – 270.

Non-Peer-Reviewed Publications:

Dean, C., **Surette, T.**, & Clark, P. (2019). Self-study report prepared for Maine department of education's review team.

Surette, T. (July, 2018). Presentations from ISTE 2018 conference. *UMS Faculty Focus – e-Learning Teaching Strategies in Higher Ed. (Blog)*.

Surette, T. (June, 2018). 2018 international society for technology in education (ISTE) international conference. *UMS Faculty Focus – e-Learning Teaching Strategies in Higher Ed. (Blog)*.

Surette, T. (May, 2018). Using the ZOOM videoconferencing tool to facilitate online class meetings. *UMS Faculty Focus – e-Learning Teaching Strategies in Higher Ed. (Blog)*.

Surette, T. (April, 2018). Students' perceptions of a synchronous conference with their instructor during an online asynchronous course. *UMS Faculty Focus – e-Learning Teaching Strategies in Higher Ed. (Blog)*.

Surette, T. (March, 2018). Podcasts!. *UMS Faculty Focus – e-Learning Teaching Strategies in Higher Ed. (Blog)*.

Surette, T. (February, 2018). Organizing your blackboard course to support student success. *UMS Faculty Focus – e-Learning Teaching Strategies in Higher Ed. (Blog)*.

Surette, T. (January, 2018). Monitoring students' progress during an asynchronous online course. *UMS Faculty Focus – e-Learning Teaching Strategies in Higher Ed. (Blog)*.

Surette, T. (December, 2017). Asynchronous online discussion questions/prompts aimed at increasing student engagement. *UMS Faculty Focus – e-Learning Teaching Strategies in Higher Ed. (Blog)*.

Surette, T. (November, 2017). Assessing asynchronous online discussions. *UMS Faculty Focus – e-Learning Teaching Strategies in Higher Ed. (Blog)*.

Surette, T. (November, 2017). Instructor decisions aimed at improving asynchronous online discussions. *UMS Faculty Focus – e-Learning Teaching Strategies in Higher Ed. (Blog)*.

Surette, T. (2016). *Beyond Traditional School-Based Teacher Induction*. (Electronic Thesis or Dissertation). Retrieved from <https://etd.ohiolink.edu/>.

Publications in Progress:

Surette, T. (2020). Exploring the role university-level and school-level communities of practice have in supporting early career teachers. *The New Educator Journal* (In Progress).

PRESENTATIONS

National Refereed Presentations:

* Indicates student collaborator.

Surrette, T. (November, 2020). Supporting early career mathematics and science teachers and career changers. Accepted at the *School Science and Mathematics Annual Conference*, Minneapolis, MN.

Surrette, T. (February, 2020). Providing rurally placed student teachers opportunities to engage with diverse student populations. Presented at the *Clinical Practice Fellows Symposium at the Association for Teacher Educators Annual Conference*, Atlantic City, NJ.

Surrette, T. & Overall, T. (November, 2019). Innovative approaches to designing and delivering a multi-campus secondary mathematics methods course. Proposal submitted to *School Science and Mathematics Annual Conference*, Salt Lake City, UT.

Surrette T. & Maloney, P. (June, 2018). Pre / In-service teachers' perceptions of PLT e-unit – energy in ecosystems. Presented at 2018 *Project Learning Tree (PLT) International Coordinators' Conference*, Cody, WY.

Surrette, T. (May, 2018). Examining opportunities for rurally placed student teachers to demonstrate pedagogical knowledge and skills associated with the InTASC standards. Presented at the *National Student Teaching and Supervision Conference*, West Chester, PA.

Surrette, T. (October, 2016). Web-based tools to facilitate collaborative experiences in methods of teaching STEAM courses. Presented at the *School Science and Mathematics Annual Conference*, Phoenix, AZ.

Surrette, T. (October, 2016). Influence of mentoring and professional communities on early career teacher development. Presented at *University of New Mexico Mentoring Institute Annual Conference*, Albuquerque, NM.

Surrette, T. (November, 2014). Active-engagement instructional strategies to support student learning in university-level STEM courses. Presented at *School Science and Mathematics Association Conference*, Jacksonville, FL.

Surrette, T. (November 2013). Investigating the experiences of three novice teachers participating in electronic mentoring. Presented at *School Science and Mathematics Association Conference*, San Antonio, TX.

Israel, M., Maynard, K., Micham, S., & **Surrette, T.** (April, 2013). Exploring engineering with diverse learners: A mixed methods study examining variables affecting learning and attitudes. Presented at the *National Association for Research in Science Teaching Annual International Conference*, Rio Grande, Puerto Rico.

Meyer, H., Stinson, J., **Surrette, T.** & Grasso, S. (January, 2013). Developing science teacher leaders: Induction to master teachers. Presented at the *Association for Science Teacher Education Conference*, Charleston, SC.

Surrette, T. & Wuebker M. (November, 2012). Assessing the ability of an online environment to provide effective professional development to teachers. Presented at *School Science and Mathematics Association Conference*, Birmingham, AL.

Regional/State Referred Presentations:

Surrette, T. & Alley, L. (October, 2019). Using social-emotional learning strategies to support students with adverse childhood experiences. Presented at *Maine Education Association Fall Conference*, Hampden, ME.

Surrette, T. & Dean, C. (October, 2019). Exploring the academic and professional needs of educational technicians in Maine. Presented at the *Maine Education Association Fall Conference*, Hampden, ME.

Surrette, T. & Dean, C. (October, 2019). Increase student engagement using ZOOM. Presented at the *Association of Computer Teacher Educators of Maine*, Augusta, ME.

Surrette, T. & Overall, T. (May, 2019). Lessons learned from designing and delivering a hybrid (face-to-face, synchronous, and asynchronous online) multi-campus undergraduate course. Accepted at *2019 Faculty Institute*, Augusta, ME.

Hill, M.*, Wallace, J.*, Meserve, M.*, Kenny, J.*, **Surrette, T.**, Dean, C., & Miller, A. (May, 2019). Using the ZOOM videoconference tool to increase student engagement in online courses and degree programs. Accepted at *2019 Faculty Institute*, Augusta, ME.

Surrette, T., Maloney, P., Higgins, K., & Wilson, L. (March, 2019). Leveraging collaborative partnerships to enhance and expand environmental education opportunities for students in Maine. Accepted at the *2019 Maine Environmental Education Association Conference*, Belfast, ME.

Corlew, K., McMahon, S., **Surrette, T.**, & Donisvitch, A. (March, 2019). How can we strengthen our network of scholars, practitioners, and partners so our collective work can be enhanced and amplified? Accepted at the *2019 Eastern Regional Campus Compact Conference*, Providence, RI.

Hirosuke, H., **Surrette, T.**, Dube, M. (November, 2018). Assessing and improving vocational relevance in professional studies. Presented at the *New England Educational Assessment Network 2018 Fall Forum*, Worcester, MA.

Dean, C., Clark, P. & **Surrette, T.** (May, 2018). Exploring the academic and professional needs of educational technicians in Maine. Presented at the *New England Educational Research Organization Annual Conference*, Portsmouth, NH.

Surrette, T., Ball, H., & Nunez-Olmstead, H. (May, 2018). Designing accessible online courses in blackboard. Presented at the *2018 University College Faculty Institute*, Augusta, ME.

Surrette, T. (May, 2017). Discussions when you're the only one in the room: Strategies and

web-based tools designed to increase and deepen student engagement in asynchronous online discussion forums. Presented at the *University College Faculty Institute*, Augusta, ME.

Walden, K.* & **Surette, T.** (March, 2017). Learning to think: schema theory, teaching, and the humanities. Presented at the *Maine Council for English Language Arts Annual Conference*, Rockport, ME.

Invited Workshops and Presentations:

Surette, T. (September, 2019). Leveraging learners. Presented at the *UMA Connect Learning in Community Knowledge Fall Conference*, Augusta, ME.

Surette, T. (July, 2018). Engaging adults with social constructivist teaching strategies and active learning experiences. Presented at the *Summer Academy for Adult Learning and Teaching*, Portland, ME.

Surette, T. (May, 2018). Strategies and web-based tools designed to increase and deepen student engagement in asynchronous online discussion forums. Presented at *Husson University Faculty Professional Development Workshop*, Bangor, ME.

Surette, T. & King, L. (March, 2018). Rubrics to the rescue! Presented at *University College Lunch and Learn Series*, Augusta, ME.

Surette, T., Doran, K., & Stallard, J. (February, 2018). Overview / exploration of PLT e-unit – energy in ecosystems and barriers, advantages, & biases associated with online teaching/learning. Presented at *Immersion/Transition Maine Project Learning Tree Gathering*, Nobleboro, ME.

Haines, L. & **Surette, T.** (November, 2017). Overview / exploration of PLT e-unit – energy in ecosystems. Presented at *Project Learning Tree pk-8th Educator Workshop*, Bates College, Lewiston, ME.

Surette, T. (November, 2017). The power of choice: designing a well-structured course assignment that values student choice and assesses course learning outcomes. Presented at *UMA Academic Assessment Committee Lunch and Learn Series*, Augusta, ME.

Surette, T. & McCord, T. (October, 2017). Discussions and blogs to engage your students. Presented at *University College Lunch and Learn Series*, Augusta, ME.

Surette, T. (August, 2017). Strategies and web-based tools designed to increase and deepen student engagement in asynchronous online discussion forums. Presented at the *University of Maine Center for Innovation in Teaching and Learning*, Orono, ME.

Surette, T. (October, 2016). Strategies to improve student participation in online discussions. Presented at the *University of Maine at Augusta Research and Pedagogy Colloquium Series*, Augusta, ME.

Surette, T. (February, 2013). Web-based tools to support student learning. Presented at *Student-Teacher Workshop*, University of Maine, Orono, ME.

RESEARCH/TRAINING GRANTS

Surette, T. (Fall, 2020). Bridging the gap between pre-service and in-service teaching in Maine with a virtual community of practice. *University of Maine at Augusta Presidential Research Grant*, (In progress)

Surette, T. (Fall, 2019). Providing UMA teacher candidates opportunities to engage with diverse student populations – year two. *University of Maine at Augusta Diversity Committee Grant*, (fully funded, \$500.00)

Surette, T. (Spring, 2019). Providing UMA teacher candidates opportunities to engage with diverse student populations. *University of Maine at Augusta Diversity Committee Grant*, (fully funded; \$250.00)

Dean, C., **Surette, T.**, Clark, P. (Co-Principal Investigators) (Spring, 2018). *University of Maine at Augusta Academic Programs of the Future Grant*. (fully funded; \$74,500)

Surette, T. & Overall, T. (Co-Principal Investigators) (Spring, 2017). Methods of secondary mathematics: developing a virtual course for pre-service teachers from multiple UMS campuses. *University College Faculty e-Learning Technology Grant*, (fully funded; \$1500.00).

Hirosuke, H. & **Surette, T.** (Co-Principal Investigators) (Spring, 2017). How do adult students relate their academic studies with their work experiences and career aspirations?: Enhancing the interrelatedness to promote student success. *Presidential Research Innovation Grant*, (fully funded, \$5,285.00).

Maloney, P. & **Surette, T.** (Co-Principal Investigators) (Spring, 2017). United States Environmental Protection Agency (EPA), *Environmental Education and Training Partnership (ee360) Competitive Grant*. (fully funded; \$6,995.00).

Surette, T. (Summer, 2016). *University of Maine at Augusta Technology Grant*. (fully funded; \$950.00).

Surette, T. (Summer, 2016). *University of Maine at Augusta Technology Grant*. (fully funded; \$950.00)

COMMUNITY/CIVIC SERVICE

08/20 – Present Education Committee of the Maine Multi Cultural Center (MMCC), Bangor, ME.

11/18 – Present Southern Penobscot Regional Program for Children with Exceptionalities (SPRCE) board of directors.

- 11/17 – Present School Committee for the Bangor School Department, Bangor, ME
- 09/17 – Present Teacher Education Alliance of Maine (TEAMe)
- 01/16 – Present Maine Project Learning Tree (ME-PLT) Steering Committee
- 11/17 – 11/18 Region #4 Cooperative Board, United Technology Center, Bangor, ME
- 07/12 – 08/13 Volunteer at the Society of St. Vincent DePaul, Cincinnati, Ohio Chapter
- 03/16/13 Science Fair Judge, Science and Engineering Expo, Cincinnati, OH
- 12/17/12 Science Fair Judge, Clark Montessori Jr./Sr. High School, Cincinnati, OH
- 08/08 – 09/11 School Liaison to Chaisson Field Committee, Milford, ME
- 10/06 – 12/06 Youth Mentor for the “Jumpstart” program offered at the Young Men’s Christian Association (YMCA), Bangor, ME

UNIVERSITY SERVICE

- 01/18 – Present Civic Engagement Committee, University of Maine at Augusta
- 01/18 – Present Faculty Representative to the University of Maine System Board of Trustees, University of Maine at Augusta
- 01/18 – Present Faculty Senate Leadership Team, University of Maine at Augusta
- 01/18 – Present President’s Cabinet, University of Maine at Augusta
- 01/18 – Present Faculty Representative to the UMS Academic and Student Affairs Sub Committee of the UMS Board of Trustees, University of Maine at Augusta
- 09/16 – Present Education Department Committee, University of Maine at Augusta
- 09/16 – Present Faculty Senate, University of Maine at Augusta
- 09/16 – Present Assessment Committee, University of Maine at Augusta
- 09/16 – Present Advising (126 students), University of Maine at Augusta
- 09/15 – Present Social Sciences Department/Committee, University of Maine at Augusta
- 01/20 – 03/20 Search Committee for Director of Field Experience and Assessment
- 09/18 – 03/19 Psychology Faculty Search Committee

11/16 – 03/17 Dean of Admissions Search Committee, University of Maine at Augusta

09/14 – 05/15 Diversity and Difference Standing Committee, University of Maine, Orono, ME

09/13 – 05/14 Distance Learning Representative for Graduate School Association for the College of Education, Criminal Justice, and Human Services, University of Cincinnati, OH

05/12 – 09/13 President of Graduate School Association for the College of Education, Criminal Justice, and Human Services, University of Cincinnati, OH

09/12 – 12/12 Secondary Education Faculty Committee, University of Cincinnati, OH

01/12 – 02/12 Secondary Education: Social Studies, Faculty Search Committee, University of Cincinnati, OH

10/11 – 05/12 Vice-President of Graduate School Association for the College of Education, Criminal Justice, and Human Services, University of Cincinnati, OH

JOURNAL REVIEW ACTIVITY

10/12 – Present Reviewer, *School Science and Mathematics Journal*, 10/12, 11/12 05/13, 11/13, 07/14, 05/15, 08/16, 06/18, 12/18, 05/19, 10/19, 02/20

03/20 – Present Reviewer, *The New Educator*, 03/20

University of Maine System
Board of Trustees

AGENDA ITEM SUMMARY

NAME OF ITEM: New Academic Proposal: Associate of Arts in Social Science, UMA

INITIATED BY: Dannel P. Malloy, Chancellor

BOARD INFORMATION:

BOARD ACTION: X

BOARD POLICY:

305.1 Program Approval, Review & Elimination Procedures

UNIFIED ACCREDITATION CONNECTION:

As emphasized in the 2023-28 University of Maine System Strategic Plan, unified accreditation is "the mechanism through which our universities and law school are able to maximize resources and capitalize on opportunities for growth and collaboration."

The Academic and Student Affairs Committee of the Board ensures that every effort is made to operationalize unified accreditation in its review of proposed academic programs.

The Vice Chancellor for Academic and Student Affairs has actively explored multi-university collaboration(s) for this proposed academic program with the system-wide Chief Academic Officers Council. The proposed program

___ represents a multi-university collaboration in the following way(s):

___ may represent a future multi-university collaboration under the following condition(s) and in the following way(s):

X does not represent a multi-university collaboration for the following reason(s):

We have not yet developed multi-university A.A. degree programs under unified accreditation, though nothing prevents our universities from doing so. For the UMA A.A. in Social Science, transfer collaborations with the Maine Community College System and other UMS institutions are under discussion with the goal of creating multiple pathways for Social Science students to attain their educational and career goals.

If the proposed academic program fulfills/advances one or more actions or goals in the UMS Strategic Plan, please indicate by name which action(s) and/or goal(s) that is, and how the proposed program will fulfill or advance it/them:

This proposal meets and advances the goal articulated in the Strategic Plan's Commitment 2 (Effective Academic Portfolio Actions section), Action 1:

Develop innovative programs and curricula responsive to changing economic and workforce needs, data-driven projections of growth areas, and technological innovation.

BACKGROUND:

The UMA Associate of Arts in Social Science is designed to support the needs of adult degree completion and transfer students by 1) delivering foundational knowledge in Social Science theory and research, 2) providing a credentialing pathway for those students who depart higher education prior to completion of the four-year degree, and 3) serving as a significant marker of accomplishment for students on their way to the B.A. degree. This program also taps into existing UMA faculty expertise in Social Science and strengthens UMA's portfolio of academic offerings.

The Academic and Student Affairs Committee forwards this item to the Consent Agenda at the May 19-20, 2024, Board of Trustees meeting for approval of the following resolution:

TEXT OF PROPOSED RESOLUTION:

That the Board of Trustees accepts the recommendation of the Academic and Student Affairs Committee, and approves the Associate of Arts in Social Science at the University of Maine at Augusta.

Attachment

[UMA AA in Social Science](#)



UMS Academic and Student Affairs
Estabrooke Hall
Orono, Maine 04469
207-973-3211
www.maine.edu

Date: April 1, 2024

To: Dannel Malloy, Chancellor
University of Maine System (UMS)

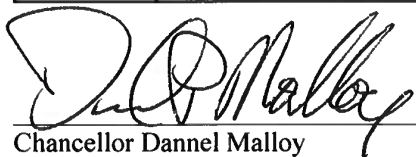
From: Jeffrey St. John, VCASA \<

Regarding: New Program Addition, A.A. in Social Science, UMA

Please find the attached program proposal from the University of Maine at Augusta to offer the Associate of Arts in Social Science. The attached material includes documentation of university level support including approval from President Cushman and the full program proposal.

The proposed addition of the Associate of Arts in Social Science was reviewed and recommended by the Chief Academic Officers Council on March 21, 2024. I also recommend this program for your approval.

I approve	I do not approve for the reasons listed below	Additional information needed for decision	Action
✓			Recommend the A.A. in Social Science program at the University of Maine at Augusta


Chancellor Dannel Malloy

4.2.24
Date

17.1

Maine's Public Universities

University of Maine • University of Maine at Augusta • University of Maine at Farmington
University of Maine at Fort Kent • University of Maine at Machias • University of Maine at Presque Isle
University of Maine School of Law • University of Southern Maine



OFFICE OF THE VICE PRESIDENT FOR ACADEMIC AFFAIRS & PROVOST

207.621.3360 *office* / 207.621.3293 *fax*

46 University Drive, Augusta, Maine 04330-9488
www.uma.edu | 1.877.UMA.1234

MEMORANDUM

TO: Jeffrey St. John
Vice Chancellor of Academic Affairs

FROM: Joseph Szakas *JSS*
Vice President of Academic Affairs/Provost

DATE: March 15, 2024

SUBJECT: Program Proposal (Steps 2 & 3): Associate of Arts in Social Science

The University of Maine at Augusta (UMA) is seeking approval of a program proposal for an Associate of Arts in Social Science to begin in the Fall of 2024.

Rationale:

The Associate of Arts in Social Science provides a milestone marker and increases the likelihood of 4-year degree completion among undergraduates. The UMA Social Science program has developed this degree to align with the UMS Strategic Plan, particularly the goals of enrollment, retention, workforce development and research. The AA Social Science degree will promote enrollment by supporting transfer students and adult degree completion. Students will be exposed to coursework that provides a competitive advantage in the job market. They will also learn basic research skills that are applicable to the workforce and transferable to a baccalaureate degree.

APL X-P.1 "Academic Program Approval," Step 2: Development of Program Proposal, states that upon approval of an ITP from the VCASA office, a Program Proposal will be prepared and evaluated through the university's normal curricular process(es). After completion of the program proposal, the university-level evaluation is initiated by the distribution of the proposal to the university's normal curricular process.

UMA's Intent to Plan for an Associate of Arts in Social Science was reviewed by the Chief Academic Officers in October 2023 and approved by the Vice Chancellor of Academic Affairs on October 19, 2023. The AA Social Science received full review and approval by the appropriate campus stakeholders including the Social Science Department Coordinator, Dean of the College of Arts and Sciences, UMA Curriculum Committee, UMA Faculty Senate, myself and the President.

17.1

APL X-P.1 “Academic Program Approval,” Step 3: University of Maine System (UMS) Evaluation states, after campus approval of the new program proposal, the University of Maine System (UMS) review is initiated by submission of the proposal by the University President (or designee) to the Vice Chancellor for Academic and Student Affairs (VCASA), who will acknowledge receipt of the document and distribute the proposal electronically to the members of the CAOC. The CAOC will review and discuss the proposed program at the first available CAOC meeting.

Please let me know if you have any questions or require additional information.



OFFICE OF THE PRESIDENT

207.621.3041 office | 207.621.3393 fax

46 University Drive, Augusta, Maine 04330-9488
www.uma.edu | 1.877.UMA.1234

MEMORANDUM

TO: Jeffrey St. John
Vice Chancellor of Academic Affairs

FROM: Jenifer Cushman, President
Joseph Szakas, Vice President of Academic Affairs/Provost

DATE: March 15, 2024

SUBJECT: Associate of Arts in Social Science

Please accept this memo as our full support and approval of an Associate of Arts in Social Science. The intent to plan was previously submitted and approved on October 19, 2023.

Please let us know if you need additional information.

Best,

A handwritten signature in black ink, appearing to be 'Jenifer Cushman', written in a cursive style.

Jenifer Cushman, President

A handwritten signature in black ink, appearing to be 'Joseph Szakas', written in a cursive style.

Joseph Szakas, Provost



Program Proposal
Associate of Arts in Social Science

I. Full Program Title:

Associate of Arts in Social Science

II. Program objectives and content

In proposing a Social Science Associate's degree, the faculty of the social science program are mindful of a number of curricular, student-centered, and institutional benefits. First, the completion of the Social Science AA curriculum substantively represents a student's successful introduction to the subject matter and approaches of the social sciences. Second, many students at UMA either never complete a 4-year degree or take a significant period of their life to complete a 4-year degree. These students have nevertheless accomplished significant academic progress that is worthy of formal recognition. Third, research suggests that adding "milestone" markers of accomplishment along the path to a bachelor's degree (Moore and Shulock 2009) have the potential to increase the likelihood of 4-year degree completion among undergraduates (Taylor and Giani 2019). Social Science AA recipients will have the opportunity to participate in the "signature event" of a graduation ceremony, which itself has been shown to reinforce a sense of positive affiliation with the university and to thereby contribute to student retention (Kulp et al. 2021).

Please see the *Appendix* for the proposed program check sheet.

III. Program Need

The Social Science program is developing this degree to align with the UMS Strategic Plan, particularly the goals of **enrollment**, **retention**, **workforce development**, and **research**.

- This degree will promote **enrollment** at UMA, by better supporting **transfer students** and **adult degree completion**. We currently see many transfer students from Maine's community colleges and from out-of-state with a long list of social science general education credits and an interest in our degree. This degree will meet that demand, for both transfers and adult students restarting their education.

- This degree will support **retention** by increasing the transferability of students to baccalaureate degrees offered both within UMA and across the UMS. Additionally, the degree's core courses provide an excellent foundation for students who are trending toward graduate degree programs.
- This degree will provide both direct and indirect benefits to **workforce development**. Students are exposed to coursework that makes them competitive for jobs in needed professions in Maine such as social services, policy, and advocacy. Additionally, the coursework in this degree, such as COM 102: Interpersonal Communication, provides students with numerous "soft skills" that are translatable to any job, such as oral communication skills, written skills, and executive skills such as organization, planning, and time management. Lastly, we know that having a 2-year degree provides graduates with a competitive advantage on the job market.
- This degree will provide students with basic **research** skills. Courses such as PSY 100: Introduction to Psychology and SSC 220: Introduction to Research Literacy, provide students with fundamental abilities for understanding and consuming research, that are applicable to the workforce and are transferable to baccalaureate degrees.

A brief review of the Labor Statistics using the research site Lightcast (<https://lightcast.io/>) indicates that the job field of social science is growing and a field worth investing in here at UMA (see Table 1).

Job title	# Jobs 2021	# Jobs 2022	Change in Jobs 2021-22	Growth
Counselors, all other (Child, Family and Social workers)	32,010	41,038	9,028	28%
Childcare workers	517,502	533,500	15,998	3%

Social Workers, All other	51,609	56,989	5,380	10%
Community and Social Service Specialists, All Other	94,057	98,973	4,916,179	5%

Differentiation from similar existing UMS programs or how programs will complement each other

We examined Associate's degrees across the UMaine System and have determined that no competing degrees exist.

Availability of resources and finances for sustainable program support

No new support is needed. This program leverages existing faculty and courses at UMA.

IV. Program Overview

Outline of the future program evaluation process

Per UMA guidelines, the Social Science program will submit annual reports for the proposed associate's degree, along with our reports for the existing baccalaureate degree. These reports include standard quantitative metrics such as enrollment data, student headcounts, number of majors, and number of graduates as well as detailed qualitative information on areas such as program growth, and identifying and addressing student barriers.

In addition to annual reports, the degree would undergo an external review every 5 years that guides the program. These external reviews provide feedback from major stakeholder groups including students, graduates, content experts, local workforce and agency partners, and Maine legislators.

Accommodations for diverse accessibility needs under Americans with Disabilities Act (ADA)

The proposed degree would leverage existing support structures at both the program and institution level.

- University of Maine at Augusta's Student Support Services office ([link](#))
- Brightspace, course management software, has an embedded tool called "Ally" which reviews the accessibility of our Brightspace websites. UMA is a leader.

Documentation of the university's approval process, including letters of support from the university president and provost

Attached Appendix.

V. Program Resources

Pro Forma statement (maintained by the VCASA office)

This Pro Forma statement aims to justify the creation of this degree:

1. Market Demand and Student Interest:

- The field of social science continues to grow in relevance and importance, addressing critical issues and presenting job opportunities in Maine and beyond.
- Analysis of market data (as presented above) indicates an increased demand for professionals with foundational knowledge in social science-adjacent disciplines.
- Discussions throughout UMA and the UMS show a strong interest in pursuing degrees such as the Associate's Degree in Social Science that promote transferability from mid-stream community college students, increased enrollment in UMA baccalaureate degree matriculation, and increased opportunities for collaborations (i.e. 2+2) with partners within the UMS.

2. Programmatic Need:

- Offering an Associate's Degree in Social Science aligns with UMA's commitment to providing comprehensive and diverse academic offerings.
- The program fills a gap in our current academic portfolio, catering to students seeking a well-rounded education in social science disciplines and workforce skills to non-traditional students.

3. Curriculum Overview:

- The proposed curriculum encompasses a broad range of social science disciplines including our core expertise in sociology, psychology, and communication studies as well as anthropology, geography, and interdisciplinary coursework.

- Core courses will cover foundational concepts in these fields, providing students with a solid academic base for further baccalaureate and graduate pathways and basic skills for entry-level positions in related professions.

4. Retention and Transfer Opportunities:

- The Associate's Degree in Social Science will facilitate transferability pathways for students who wish to pursue higher education at the bachelor's level at UMA or at other UMS campuses.
- This degree will serve as an important milestone for current UMA students. We also believe it will serve as a tool for retaining students who might otherwise leave UMA and matriculate at competing schools (e.g. Thomas, Husson).
- Collaborations with Maine community colleges, primarily KVCC, will also facilitate increased transferability for community college students who are mid-degree.

5. Workforce and Educational Readiness:

- Graduates of this program will possess critical thinking, research, and communication skills highly sought after by employers in various sectors.
- The degree will prepare students for entry-level positions in social service agencies, research organizations, government agencies, and other fields where an understanding of social dynamics is crucial.

6. Projected Enrollment and Financial Viability:

- A steady enrollment of students per academic year is projected within the first three years.
- Since the proposed degree leverages existing faculty and requires no new courses, the degree will be financially self-sustaining, only contributing positively to the university's enrollment and retention of degree-seeking students.

7. Conclusion:

- In summary, the introduction of an Associate's Degree in Social Science aligns with the UMA's academic mission and the UMS Strategic Plan -- it responds to market demand for workforce and research skills, addresses student needs for a comprehensive social science education, promotes transferability and adult degree completion, and will sustainably contribute to enrollment and retention.

References

- Kulp, Amanda M., Amanda Blakewood Pascale, and Matthew Grandstaff. 2021. "Types of Extracurricular Campus Activities and First-year Students' Academic Success." *Journal of College Student Retention: Research, Theory & Practice* 23(3): 747-767. <https://doi.org/10.1177/1521025119876249>
- Moore, Colleen, and Nancy Shulock. 2009. *Student Progress toward Degree Completion: Lessons from the Research Literature*. California State University, Sacramento, Institute for Higher Education Leadership & Policy. https://www.csuchico.edu/gradinitiative/_assets/documents/ihelp-student-progress-toward-degree-completion.pdf
- Taylor, Jason L. and Matt Giani. 2019. "Modeling the Effect of the Reverse Credit Transfer Associate's Degree: Evidence from Two States." *The Review of Higher Education* 42(2): 427-455. <https://doi.org/10.1353/rhe.2019.0002>

Appendix

Social Science (SSC)

Associate's Degree Requirements:

- Minimum 60 Credit Hours
- Writing Intensive Course
- Minimum Cumulative G.P.A.: 2.00
- 15 Credit Hours of Residency Courses
- 9 Credits of Major Residency Courses
- Minimum G.P.A. in the Major: 2.00

Program Major Requirements (24 Credit Hours):

- PSY 100 - Introduction to Psychology **3 CR**
- PSY 308 - Human Development **3 CR**
- SOC 101 - Introduction to Sociology **3 CR**

- **SOC 201 - Social Problems 3 CR**
- **SSC 220 - Introduction to Research Literacy 3 CR**

Complete two of the following introductory social science courses (6):

- **ANT 101 - Introduction to Anthropology 3 CR**
- **ECO 100 - Introduction to Economics 3 CR**
- **GEO 101 - Introduction to Geography 3 CR**
- **POS 101 - American Government 3 CR**
- **SSC 100 - Introduction to Social Science 3 CR**

Complete one of the following communications courses (3):

- **COM 102 - Interpersonal Communication 3 CR**
- **COM 104 - Communications in Groups and Organizations 3 CR**
- **COM 109 - Nonverbal Communication 3 CR**

Other Program Requirements (28-30 Credit Hours):

- **MAT 115 - Elementary Statistics I 3 CR**
- **Complete a two-semester sequence of the same Foreign or American Sign language or a two-semester 100-level history sequence 6-8 CR**
- **ENG 101 - College Writing 3 CR**
- **Complete any 100-level laboratory science course 4 CR**

Complete one of the following Computer Information Systems courses (3):

- **CIS 100 - Introduction to Computer Applications 3 CR**
- **CIS 101 - Introduction to Computer Science 3 CR**

Complete one of the following Fine Arts electives (3):

- **ARC 100 - Architectural Design Studio for the Non-Majors 3 CR**


- ARH xxx any Art History course
- ART xxx any Art course
- DRA xxx any Drama course
- ENG 351W - Creative Writing **3 CR**
- ENG 452W - Creative Writing II **3 CR**
- MUH 1xx any 100-level Music History course
- MUS 1xx any 100-level Music course

Complete two of the following Humanities electives (6):

- AME xxx any American Studies course
- ARH 105 - History of Art and Architecture I **3 CR**
- ARH 106 - History of Art and Architecture II **3 CR**
- ASL 1xx/2xx any 100- or 200-level ASL course
- DRA xxx any Drama course
- ENG xxx any English course (except ENG 100, ENG 101, ENG 210W, ENG 317W or ENG 320W)
- FRE xxx any French course
- HGH xxx any Holocaust, Human Rights & Genocide course ● HTY xxx any History course
- HUM xxx any Humanities course
- MUH xxx any Music History course
- PHI xxx any Philosophy course
- SPA xxx any Spanish course
- WGS xxx any Women and Gender Studies course

General Electives (8-10 Credit Hours):

- Complete additional general electives to reach the required 60 total credits
8-10 CR

Email address	uma.curriculum@maine.edu
Curriculum Proposal Name	AA Social Science New Program
Curriculum Proposal File	File 1 File 2
Transmitting Faculty	Lorien Lake-Corral
Transmitting Faculty Signature Date	Feb 04, 2023
Dean	Pamela MacRae
Dean Signature Date	Feb 16, 2023
Curriculum Committee Chair	Matt Dube
Curriculum Transmittal Date	Feb 22, 2023
Secretary of the Senate	Jessica Winck
Senate Approval Date	Mar 14, 2023
Provost	 3/24/2023
President	

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**Vice Chancellor for
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Student Affairs
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Fax: 207-581-9212
www.maine.edu**

The University of Maine

University of Maine
at Augusta

University of Maine
at Farmington

University of Maine
at Fort Kent

University of Maine
at Machias

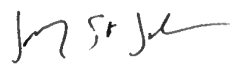
University of Maine
at Presque Isle

University of
Southern Maine

Date: October 19, 2023

To: Jenifer Cushman, President
University of Maine at Augusta (UMA)

To: Joseph Szakas, Provost
University of Maine at Augusta (UMA)

From: Jeffrey St. John, VCASA 
The University of Maine System (UMS)

Regarding: Intent to Plan – A.A in Social Science

The Chief Academic Officers Council (CAOC) reviewed the request submitted on October 19, 2023 by the University of Maine at Augusta for the Intent to Plan of the A.A in Social Science. The CAOC was supportive of this request. The VCASA supports and approves this new Intent to Plan.

This memo serves as formal confirmation of approval of the Intent to Plan of the A.A in Social Science.

Please do not hesitate to let me know if you have any questions.

17.1



OFFICE OF THE VICE PRESIDENT
FOR ACADEMIC AFFAIRS & PROVOST


207.621.3360 *office* / 207.621.3293 *fax*

46 University Drive, Augusta, Maine 04330-9488

www.uma.edu | 1.877.UMA.1234

MEMORANDUM

TO: Jeffrey St. John
Vice Chancellor of Academic Affairs

FROM: Joseph Szakas 
Vice President of Academic Affairs/Provost

DATE: October 13, 2023

SUBJECT: Program Request (Step 1): Associate of Arts degree in Social Science

The University of Maine at Augusta's College of Arts and Sciences proposes an Associate of Arts degree in Social Science.

Rationale

This proposal represents an opportunity for the UMA Social Science department to develop an Associate of Arts degree in Social Science. The Social Science program is developing this degree to align with the UMS Strategic Plan, particularly the goals of enrollment, retention, workforce development, and research. A brief review of the Labor Statistics using the research site Lightcast (<https://lightcast.io/>) indicates that occupations obtainable with an Associates degree in Social Science are associated with fields growing and therefore it is worth investing in here at UMA. This Associate degree is purely a subset of work that is already offered at UMA in our Bachelor of Science in Social Science, and no new classes, faculty or resources are needed to augment our degree offerings by adding this Associate of Arts degree in Social Science.

This letter of intent submission is in accordance with APL X-P.1 "Academic Program Approval," Section I. "Approval of Undergraduate Majors, graduate degree programs, and advanced certificates of study, Step 1: Program Request" is the relevant section of the University of Maine System Administrative Practice Letters. The policy indicates that the 250-word program request should be submitted electronically to the VCAA and Chief Academic Officers for consideration. "Except under extenuating circumstances, formal response from a Provost Office and the VCAA office regarding the CAOC recommendation should occur within two weeks."

Please let me know if you have any questions or require additional information.

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**Intent to Plan
Associate of Arts in Social Science**

A. General Objectives

In proposing a Social Science Associate's degree, the faculty of the social science program are mindful of a number of curricular, student-centered, and institutional benefits. First, the completion of the Social Science AA curriculum substantively represents a student's successful introduction to the subject matter and approaches of the social sciences. Second, many students at UMA either never complete a 4-year degree or take a significant period of their life to complete a 4-year degree. These students have nevertheless accomplished significant academic progress that is worthy of formal recognition. Third, research suggests that adding "milestone" markers of accomplishment along the path to a bachelor's degree have the potential to increase the likelihood of 4-year degree completion among undergraduates. Social Science AA recipients will have the opportunity to participate in the "signature event" of a graduation ceremony, which itself has been shown to reinforce a sense of positive affiliation with the university and to thereby contribute to student retention.

B. Evidence of Need

The Social Science program is developing this degree to align with the UMS Strategic Plan, particularly the goals of **enrollment**, **retention**, **workforce development**, and **research**.

- This degree will promote **enrollment** at UMA, by better supporting transfer students and adult degree completion. We currently see many transfer students from Maine's community colleges and from out-of-state with a long list of social science general education credits and an interest in our degree. This degree will meet that demand, for both transfers and adult students restarting their education.
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17.1

C. Involvement of similar programs

We examined Associate's degrees across the UMaine System and have determined that no competing degrees exist.

D. Extent of Support/New Costs Required

No new support is needed. This program leverages existing faculty and courses at UMA.

E. Timeline

Fall 2024

Social Science (SSC)

Associate's Degree Requirements:

- Minimum 60 Credit Hours
- Writing Intensive Course
- Minimum Cumulative G.P.A.: 2.00
- 15 Credit Hours of Residency Courses
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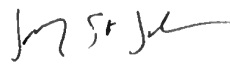
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The University of Maine System (UMS)

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Please do not hesitate to let me know if you have any questions.

17.1



UMS Academic and Student Affairs

Estabrooke Hall
Orono, ME 04469

207-581-5842

Date: March 26, 2024

To: Jennifer Cushman, President
University of Maine at Augusta (UMA)

Joseph Szakas, Provost
University of Maine at Augusta (UMA)

From: Jeffrey St. John, VCASA }
The University of Maine System (UMS)

Regarding: Program Addition – A.A. in Social Science

The Chief Academic Officer's Council (CAOC) reviewed the request submitted on March 21, 2024 by the University of Maine at Augusta for an addition of the A.A. in Social Science. The CAOC was supportive of this request. I support and approve this addition.

This memo serves as formal confirmation of approval of the addition of the A.A. in Social Science.

Please do not hesitate to let me know if you have any questions.

17.1

Maine's Public Universities

University of Maine • University of Maine at Augusta • University of Maine at Farmington
University of Maine at Fort Kent • University of Maine at Machias • University of Maine at Presque Isle
University of Maine School of Law • University of Southern Maine