USM Town Hall Meeting

Where have we been and where are we going for the next 5 years?

Dr. Glenn Cummings, President

February 14, 2020
Town Hall Agenda

1. Welcome & Board of Visitors Introductions
2. Achievements of the last 5 years
3. Where are we going in the next 5 years?
4. Questions & Answers

Please email your questions to usm.president@maine.edu
Achievements in the Last 5 Years

- Enrollment +7.3%
  - Headcount: 8,429
- Budget: 5 years in the black
- Donations $7.3 million was raised to benefit USM students & programs
- Retention +7%
  - Return rate from 1st to 2nd year: 69%
Career/Student Success Center & Residence Hall
Career and Student Success Center
Portland Residence Hall
Investments in People

Faculty +8 (2019: 421)*

Staff +55 (2019: 452)

Administrators -2 (2019: 17)

Students

➤ $16M in Scholarships
➤ Access to Education
➤ Equity & Social Justice

*Last 3 Years: FTE includes part time
Average Undergraduate Debt Incurred at USM by Graduation Year
What’s Next?

- Academic Excellence
- Equity and Justice
- Superior Value
- Connecting Students with Their Futures
- Strong Relationships & Supportive Environment
- Multiple Points of Access Across the Lifespan
- Environmental Sustainability
Student Focused

Every Day

Please email your questions to

usm.president@maine.edu
Goal 10: Equity and Justice

Commitment One: We will undertake a university-wide equity audit

Commitment Two: We will undertake a full curriculum review

Commitment Three: We will invest in positions that focus on issues of equity & inclusion

Commitment Four: We will increase investment in learning, training & development

Commitment Five: We will engage in university-wide Common Read that focuses on issues of equity and justice
Goal 10: Equity and Justice

Common Read
  → Summer Antiracist Seminar

REI trainings held at USM

Strategizing the Search Trainings
  → Diversity Statement Required

Chair Development Series

New Faculty Orientation

IDAC activities ongoing

Search for AVP Equity & Inclusion

Search for Intercultural Student Affairs

Commencement Speaker
Academic Vision Update

Pillar Grant Report

Grants Funded, 18
- Funding Committed, Fiscal 20, $259,950
- Funding Committed, Fiscal 21, $67,515

Faculty Funded, 29
- Pre-tenure Faculty Funded, 12

Staff Funded, 7
Pillar Grant Themes

Experimental Learning
- Service Learning
- Student-Faculty Travel
- Student-Faculty Projects or Research

Faculty and Staff Professional Development
- Universal Design
- Antiracist Pedagogy
- Multimodality, Digital Literacy, Digital Humanities
- Information Literacy
- *Inquiry-Based Pedagogy and the “Wicked Problem”
Pillar Grant Themes

The Curriculum of the Future
  – Maker Innovation Studio (MIST) Updates and Equipment
  – Digital Infrastructure
  – Creativity
  – Wiring and Social Justice

Life after USM
  – Launching into Life After College
  – History Internships
FY 2021 Budget Levers (E&G)

**Fixed**
- Tuition & Fees: $2,269,009
- State Appropriation: ($538,761)
- Compensation: $1,270,426
- Operational (Shared Services): $162,680

**Flexible**
- Tuition & Fees: ($127,140)
- Indirect Cost Recovery: $0
- Auxiliary Enterprise Transfer: $0
- Position: $380,474
- Operational (Campus): ($797,540)
- Scholarships & Grants: $1,200,420
FY 2021 Budget Overview

- **USM FY21 budget in balance with rebased accounts that reflect historical spending levels and/or University investment priorities.**

- **By driving efficiencies, USM created additional bandwidth in its budget which would fund key initiatives:**
  - Workforce engagement ➔ full-scale commitment to student career preparation and advancement supported by USM academic vision through numerous funding mechanisms.
  - Online education ➔ investment in personnel and program development that continues to drive growth in USM enrollment (e.g., Masters/PhD in Leadership and Organizational Studies).
  - Equity funding ➔ Race and Intercultural and Diversity Council funding to meet foundational program need for USM Goal #10.

- **FY21 attrition target of $2.7m reflects realistic level of attrition in coming fiscal year.**
  - Continued goal of reducing attrition and eliminating line item from budget.

- **Institutional Aid:** Strong investment in student scholarships have driven student enrollment, and reduced student debt, but have added pressure to budget.
  - FY21 budget includes additional $1.2m in merit scholarship line to mirror recent annual spending levels and affirm USM’s commitment to providing aid and remaining competitive in recruiting / retaining students and ensuring student success.

- **Auxiliary Budget:** positive and continually improving story with operating surplus of $824k and free cash flow to University of $463k.

- **Topline growth:** USM remains well-positioned to drive topline growth and benefit UMS and State of Maine by attracting out-of-state students.
  - Development of Portland campus will maximize this effort.
Budget Goals & Strategies

• Standardize budget development process; right-size budgeted accounts to acknowledge true costs and funding priorities; and establish financial controls.

• Ensure available resources are deployed strategically to support student-centered focus.

• Implement regular financial and enrollment forecasting processes.

• Eliminate budgeted attrition savings as shortfall plug → utilize to rebuild reserves and fund key strategic efforts, e.g., increasing resources for advising and career services.

• Maintain a conservative balance sheet strategy while accomplishing broad campus development goals.

• Review academic program offerings based on key performance indicator dashboards → Departmental Indicator Report and Academic Snapshot.

• Continue developing Auxiliary revenue streams to enhance University resources.
  - Auxiliary has begun to yield a substantial operating surplus; has the potential to grow considerably with good business decisions, entrepreneurial approach.
FY 2021 Budget Drivers

- FY 2021 Total Budget: $133.3 million
  - Education & General: $119.4 million
  - Auxiliary: $13.8 million
- Since FY 2017, USM expenditures have grown by 14.8% (8.4% accounting for inflation); 3.5% annually; credit hours are up 9.8%.
- Net Tuition & Fees account for 52.3% of E&G revenue; State appropriation is 41.2%.

FY21 Total Revenue

- Net Tuition/Fees: 47%
- State Approp.: 37%
- Dining / Res.: 10%
- F&A Recovery: 4%
- Sales / Service: 3%
- Investment Income: 0%

FY21 Total Expenses

- Compensation: 64%
- Non-Compensation: 36%
## USM FY 2021 Budget: E&G (Excluding Maine Law)

<table>
<thead>
<tr>
<th>Revenue</th>
<th>FY20</th>
<th>FY21</th>
<th>$ Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition &amp; Fees</td>
<td>$75,728,193</td>
<td>$77,891,911</td>
<td>$2,163,718</td>
<td>2.9%</td>
</tr>
<tr>
<td>Less: Waivers/Scholarships</td>
<td>(16,321,551)</td>
<td>(17,521,971)</td>
<td>(1,200,420)</td>
<td>7.4%</td>
</tr>
<tr>
<td>Appropriation</td>
<td>48,098,693</td>
<td>47,559,932</td>
<td>(538,761)</td>
<td>-1.1%</td>
</tr>
<tr>
<td>Indirect Cost Recovery</td>
<td>3,525,000</td>
<td>3,525,000</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Investment Income</td>
<td>120,000</td>
<td>127,165</td>
<td>7,165</td>
<td>6.0%</td>
</tr>
<tr>
<td>Sales/Services/Other</td>
<td>3,433,151</td>
<td>3,900,250</td>
<td>467,099</td>
<td>13.6%</td>
</tr>
<tr>
<td><strong>Total E&amp;G Revenue</strong></td>
<td>$114,583,486</td>
<td>$115,482,287</td>
<td>$898,801</td>
<td>0.8%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expense</th>
<th>FY20</th>
<th>FY21</th>
<th>$ Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel Expense*</td>
<td>81,350,996</td>
<td>83,001,896</td>
<td>$1,650,900</td>
<td>2.0%</td>
</tr>
<tr>
<td>Fuel/Electricity</td>
<td>3,066,649</td>
<td>2,664,458</td>
<td>(402,191)</td>
<td>-13.1%</td>
</tr>
<tr>
<td>Supplies/Services</td>
<td>5,595,663</td>
<td>6,321,907</td>
<td>726,244</td>
<td>13.0%</td>
</tr>
<tr>
<td>Shared Services</td>
<td>12,610,098</td>
<td>12,772,778</td>
<td>162,680</td>
<td>1.3%</td>
</tr>
<tr>
<td>Travel</td>
<td>1,139,486</td>
<td>1,295,069</td>
<td>155,583</td>
<td>13.7%</td>
</tr>
<tr>
<td>Maintenance &amp; Alterations</td>
<td>1,921,301</td>
<td>2,156,444</td>
<td>235,143</td>
<td>12.2%</td>
</tr>
<tr>
<td>Depreciation</td>
<td>6,781,045</td>
<td>7,099,059</td>
<td>318,014</td>
<td>4.7%</td>
</tr>
<tr>
<td>Interest</td>
<td>601,043</td>
<td>546,640</td>
<td>(54,403)</td>
<td>-9.1%</td>
</tr>
<tr>
<td>Other Expenses &amp; Transfers</td>
<td>5,336,231</td>
<td>3,560,301</td>
<td>(1,775,930)</td>
<td>-33.3%</td>
</tr>
<tr>
<td><strong>Total Other Expenses &amp; Transfers</strong></td>
<td>37,051,516</td>
<td>36,416,656</td>
<td>(634,860)</td>
<td>-1.7%</td>
</tr>
<tr>
<td><strong>Total E&amp;G Expense</strong></td>
<td>118,402,512</td>
<td>119,418,552</td>
<td>1,016,040</td>
<td>0.9%</td>
</tr>
</tbody>
</table>

**Operating Increase (Decrease)**

<table>
<thead>
<tr>
<th>FY20</th>
<th>FY21</th>
<th>$ Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>($3,819,026)</td>
<td>($3,936,265)</td>
<td>($117,239)</td>
<td>3.1%</td>
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</tbody>
</table>

**Add back Depreciation**

<table>
<thead>
<tr>
<th>FY20</th>
<th>FY21</th>
<th>$ Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>6,781,045</td>
<td>7,099,059</td>
<td>318,014</td>
<td>4.7%</td>
</tr>
</tbody>
</table>

**Less: Capital Expenditures**

<table>
<thead>
<tr>
<th>FY20</th>
<th>FY21</th>
<th>$ Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1,665,247)</td>
<td>(1,699,997)</td>
<td>(34,750)</td>
<td>2.1%</td>
</tr>
</tbody>
</table>

**Less: Debt Service Principal**

<table>
<thead>
<tr>
<th>FY20</th>
<th>FY21</th>
<th>$ Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1,296,772)</td>
<td>(1,359,277)</td>
<td>(62,505)</td>
<td>4.8%</td>
</tr>
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</table>

**Free Cash Flow**

<table>
<thead>
<tr>
<th>FY20</th>
<th>FY21</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0</td>
<td>$103,520</td>
</tr>
</tbody>
</table>
# USM FY 2021 Budget: Auxiliary

<table>
<thead>
<tr>
<th>Revenue</th>
<th>FY20</th>
<th>FY21</th>
<th>$ Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition &amp; Fee Revenue</td>
<td>$1,227,714</td>
<td>$1,129,658</td>
<td>($98,056)</td>
<td>-8.0%</td>
</tr>
<tr>
<td>Less: Waivers/Scholarships</td>
<td>(400,000)</td>
<td>(500,000)</td>
<td>(100,000)</td>
<td>25.0%</td>
</tr>
<tr>
<td>Dining &amp; Residence</td>
<td>12,783,470</td>
<td>13,201,965</td>
<td>418,495</td>
<td>3.3%</td>
</tr>
<tr>
<td>Sales/Services/Other</td>
<td>641,800</td>
<td>840,636</td>
<td>198,836</td>
<td>31.0%</td>
</tr>
<tr>
<td><strong>Total Auxiliary Revenue</strong></td>
<td>$14,252,984</td>
<td>$14,672,259</td>
<td>$419,275</td>
<td>2.9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expense</th>
<th>FY20</th>
<th>FY21</th>
<th>$ Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel Expense</td>
<td>$2,495,467</td>
<td>$2,575,917</td>
<td>$80,450</td>
<td>3.2%</td>
</tr>
<tr>
<td>Fuel/Electricity</td>
<td>984,664</td>
<td>905,499</td>
<td>(79,165)</td>
<td>-8.0%</td>
</tr>
<tr>
<td>Supplies/Services</td>
<td>4,656,358</td>
<td>4,887,311</td>
<td>230,953</td>
<td>5.0%</td>
</tr>
<tr>
<td>Travel</td>
<td>16,600</td>
<td>25,572</td>
<td>8,972</td>
<td>54.0%</td>
</tr>
<tr>
<td>Maintenance &amp; Alterations</td>
<td>947,918</td>
<td>1,102,391</td>
<td>154,473</td>
<td>16.3%</td>
</tr>
<tr>
<td>Depreciation</td>
<td>1,174,780</td>
<td>1,133,705</td>
<td>(41,075)</td>
<td>-3.5%</td>
</tr>
<tr>
<td>Interest</td>
<td>1,020,884</td>
<td>934,343</td>
<td>(86,541)</td>
<td>-8.5%</td>
</tr>
<tr>
<td>Other Expense</td>
<td>2,299,034</td>
<td>2,283,453</td>
<td>(15,581)</td>
<td>-0.7%</td>
</tr>
<tr>
<td><strong>Total Auxiliary Expense</strong></td>
<td>$13,595,705</td>
<td>$13,848,191</td>
<td>$252,486</td>
<td>1.9%</td>
</tr>
</tbody>
</table>

### Operating Increase (Decrease)
- FY20: $657,279
- FY21: $824,068
- $166,789 change, 25.4%

### Modified Cash Flow

<table>
<thead>
<tr>
<th>Category</th>
<th>FY20</th>
<th>FY21</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add back Depreciation</td>
<td>1,174,780</td>
<td>1,133,705</td>
</tr>
<tr>
<td>Less: Capital Expenditures</td>
<td>(22,850)</td>
<td>(22,850)</td>
</tr>
<tr>
<td>Less: Debt Service Principal</td>
<td>(1,748,810)</td>
<td>(1,471,480)</td>
</tr>
</tbody>
</table>

### Free Cash Flow
- FY20: $60,399
- FY21: $463,443

*FY20 Base Budget as of January 20, 2020*
Expenses: Cause of Change Analysis

- FY20 Base Budget: $131,998
- Personnel: $1,731
- Fuel/Electricity/Supplies/Services: $476
- Shared Services: $163
- Travel: $165
- Maintenance: $390
- Depreciation: $277
- Interest: $(141)
- All Other: $(1,792)
- FY21 Base Budget: $133,267
### USM Compensation: 5-Year Budget to Actual

<table>
<thead>
<tr>
<th>E&amp;G, $000s</th>
<th>FY16</th>
<th>FY17</th>
<th>FY18</th>
<th>FY19</th>
<th>FY20</th>
<th>FY21</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comp – Budget</td>
<td>$74,497</td>
<td>$73,530</td>
<td>$76,876</td>
<td>$76,319</td>
<td>$81,298</td>
<td>$83,001</td>
</tr>
<tr>
<td>Comp – Actual</td>
<td>$68,795</td>
<td>$70,359</td>
<td>$72,369</td>
<td>$77,019</td>
<td>$81,052*</td>
<td></td>
</tr>
<tr>
<td><strong>Net Savings</strong></td>
<td>$5,702</td>
<td>$3,171</td>
<td>$4,507</td>
<td>($701)</td>
<td>$246</td>
<td></td>
</tr>
</tbody>
</table>

*Projected

![Graph showing USM Compensation: 5-Year Budget to Actual](image-url)

- **Comp - Budget**
- **Comp - Actual**
FY 2021 Budget Development Overview

• Key Goals
  – USM FY21 budget accounts for known likely expenses, maximizes resources to ensure investment in key priorities.
  – *Create a transparent process with seamless accessibility that makes each cost center manager a “finance person” and gives University community members a clear means to affect the budget development process.*

• Accelerated Process – Summer Start
  – Initial round of budget meetings in June ➔ subsequent rounds in September, October and November.
  – June meetings focused on review of pertinent financial data (5-year expenditures / gift account balances) and discussion of department budget context, funding goals and priorities.
  – Starting early / working with well-defined timeline, expectations allows for enhanced dialogue, feedback loops, analysis and strategic planning.
    - Benefits of iteration
    - Minimizing 11th hour decision-making
FY 2021 Budget Development Overview

• Baseline Budget Development
  – Following June meetings, financial management team crafted baseline budget utilizing 3-year historical spending trends (objective) and input received during the meetings (subjective).
  – Baseline published in August with request for initiative submission by mid-September start of Round 2 meetings → September round allowed for discussion / adjustment of initiatives, opportunities to craft new ones.
  – Historic Based Budget with ZBB elements.

• Key Elements & Improvements
  – Aligns projected resources with expected need: “Right-sized” / “Trued-up”
  – Provides clarity on USM expenditures → makes budget to actual real.
  – Eliminates potential for autopilot rolling of budget from one year to the next; acknowledges resource allocation reality; provides basis for continued improvement.
  – Comprehensive process of detailed analysis of each line-item → enables for rolled-up / rolled-down review.
FY 2021 Budget Development Overview

• Initiative Process
  – October / November: Rounds 3-4 of development process focused on detailed review of budget initiatives for inclusion in draft final budget.
    ➢ Strategic glide-paths that account for longer term opportunities, maintain financial discipline and controls.
    ➢ Enable pilot initiatives to test effectiveness / ROI.
  
  – November / December final review: President and Cabinet review final draft budget and each initiative included during the process → first meeting in November.
    ➢ President’s Cabinet review provided final checkpoint in process.
    ➢ Enables cost center managers and other community members from across the University to make final case to Cabinet Members, directly to the President → process intentionally provides for iteration, time for detailed analysis, fine-tuning of initiatives.
  
  – January 17: Submission of FY 2021 budget proposal to system office.
USM FY 2021 Budget Development Timeline

- **2019**
  - **July**: Review of UMS allocations & assumptions
  - **August**: Enrollment update

- **2020**
  - **January**: First iteration of FY21 budgets uploaded into Maine-Street
  - **February**: Budget reviewed by full FF&T of BOT
  - **March**: Final budget approval vote by BOT

**First Round Budget Meetings**
- **June**: First Round Budget Meetings

**Round II Budget Meetings**
- **July**: Round II Budget Meetings
  - Budget development / prep for 2nd Round meetings

**Round III Budget Meetings**
- **August**: Round III Budget Meetings
  - Review of UMS allocations & assumptions
  - Enrollment update

**Final Round Budget Meetings**
- **October**: Final Round Budget Meetings
  - Finalize FY21 Budget
  - Prepare expected FY21 budget transactions

**Campus Budget Presentations**
- **November**: Final FY21 campus budget adjustments

**Budget**:
- **Feb 4**: Final FY21 budget presented to BOT Chair, FF&T Chair, & Sr. UMS leadership
- **March TBD**: Final FY21 budget presented to BOT Chair, FF&T Chair, & Sr. UMS leadership
- **May TBD**: Final FY21 budget presented to BOT Chair, FF&T Chair, & Sr. UMS leadership
In FY19, a record $7.3 million was raised to benefit USM students & programs – our best year ever!

$1 Million Gift launched the Dubyak Center for Digital Science and Innovation

In Fall 2018, USM welcomed the inaugural class of Promise Scholars

3 TRANSFORMATIVE GIFTS OF $1 MILLION OR MORE

2,800+ ALUMNI, FRIENDS AND EMPLOYER PARTNERS MADE A GIFT

1 IN 4 STUDENTS WHO GRADUATED THIS MAY DONATED!
We’re gearing up for the biggest campaign in USM’s history: The Great University Campaign

Sparked by the $25 million in bond funding approved by voters in 2018 and transformational campus plans, the five-year campaign will focus on three key USM priorities:

• Academic Excellence
• Access & Affordability
• Career Readiness & a Vibrant Campus

A Catalyst for Transformation
Mission

The Career & Employment Hub provides student-focused career services to create equitable opportunities, serving as a resource that students can utilize to achieve their career aspirations. Our approach is enhanced by aligning with the needs of a changing workforce and community.

We do this by:
- Fostering close relationships with students and alumni through individualized career planning including a multiyear Career Development Program
- Facilitating and developing long-term relationships with the community and employers
- Creating internal partnerships with faculty, staff, student organizations, and academic departments

Vision

The Career & Employment Hub and the University of Southern Maine are revered as leaders in preparing students for their futures and developing a sustainable workforce by ensuring that access to life-changing career success is woven into the fabric of a USM education.
<table>
<thead>
<tr>
<th>Location</th>
<th>231 Luther Bonney Hall, Portland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website</td>
<td>usm.maine.edu/careerhub</td>
</tr>
<tr>
<td>Schedule</td>
<td><a href="https://careerhub.youcanbook.me">https://careerhub.youcanbook.me</a></td>
</tr>
<tr>
<td>appointments</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:usmcareers@maine.edu">usmcareers@maine.edu</a></td>
</tr>
<tr>
<td>Phone</td>
<td>(207) 228-8505</td>
</tr>
</tbody>
</table>
Get On Track Model

**Discover**
Discover and understand self in relation to academic and career success

**Explore**
Gain clarity on major and career options by exploring and learning about possibilities, opportunities, and professional environments

**Experience**
Obtain practical experience and identify career goals for employment and/or education

**Launch**
Transition out of undergraduate school to employment, further education or alternative path
Career/Student Success Center & Residence Hall
Career/Student Success Center

60,000 square feet
LEED Silver or Gold
Cross Laminated Timber

- Dining Services
- Student Organizations
- Open Spaces for Students
- Diversity Center(s)
- University Store
- Career Hub
- SGA
- Student Affairs
- WMPG
- Veteran Services
Residence Hall(s), 577 Beds
Upperclass, Graduate and Law Students
3 Different Housing Options
Student Housing

Housing Options:

- Single Bed with En Suite Bath
- Studio Apartment
- Apartments housing 4 students with single beds rooms or 2 students to a bedroom

Priorities for USM:

- Affordable price point for Students (upperclass, graduate, and law students)
- Student input
- Passive House – meeting sustainability goals
Career/Student Center & Residence Hall
Career/Student Success Center & Residence Hall
Portland Campus
Summer 2020 Projects

- City of Portland/DOT Deering/Brighton Avenue Round About
- High Fidelity Simulation Lab in Science Building
- Relocation of Facilities Management & all services/offices in Woodbury Student Center. Both buildings will be demolished to make way for the New Career/Student Success Center & Residence Hall project
- New Parking Lot behind Wishcamper
- 118 Bedford (White House) demolished, new parking lot
- Lower level of Payson Smith will be renovated to house Dining Services, SGA, Student Diversity Center(s) and Student Affairs staff members
- Modular units will be placed on the lawn in front of Payson Smith
Gorham Campus
Summer 2020 Projects

✓ Brooks Patio Renovation
✓ Bailey Hall Fire Protection Upgrade
✓ New Furniture for Upton-Hastings
✓ Demolition of 128 School Street
USM will be designated as a Great College to Work For®

Goal #7
Great Colleges: 4 Related Themes

- Community & Collaboration
- Communication
- Process Improvement
- Training & Development

Student Focused Every Day
Next Chance

Survey will be open March 9th through April 3rd

Much more communication later this month
Marketing

- **Agency:** Year round segmented advertising via television, radio, digital, search engine, video, and social media: $1.125m

- **Other Recruitment Efforts (between Marketing & Admissions):** $400k
  - Print Recruitment Materials (Viewbook, etc.): $70,000
  - Print Advertisement Placements: $60,000
  - Lead generation search campaigns: $50,000
  - Marketing Cloud with Journey Builder: $45,000
  - Direct Mail campaigns: $30,000
  - Encoura™ Data Lab: $27,000
  - YouVisit, online virtual campus: $25,000
  - Admit Hub chatbot: $23,000
  - ME Life Media: $10,000
  - Recruitment Travel: $60,000
Recruiting
New Commercial Launches Monday

• FY19 Removed Application Fee
• FY20 Test Optional Implemented
• FY20 Early Action Launch
• College Board Admitted Student Questionnaire (700-1000 responses): $2,500
• 2.0 Branding Launch (February 2020)
• Promise Scholars Program Expansion (USM Foundation)
• Increased funding for graduate tuition waivers
• Strategic scholarship packaging using net tuition & predictive yield data
• Maine Robotics/STEM Outreach Coordinator (in search)
• Talent Awards: STEM, Performing Arts, Civic Leadership
• “Welcome Home” campaign scholarship (Summer 2020)
• Career/Student Center & Residence Hall (Portland): $90 million

UG Recruitment & Admissions budget + Employees / Total New UG = $1,577/Per Student
10-year Undergraduate Credit Hour Comparison (Excluding Law, E-Tuition, Maine Online)

Fall Census Data

- **Early College**
  - 2019: 4,769 CH
  - 2018: 3,087 CH

- **In-State**
  - Increase In 5 Years: 2,827 CH

- **Out-of-State**
  - Increase In 5 Years: 2,961 CH

- **Total**
  - Increase In 5 Years: 5,788 CH

<table>
<thead>
<tr>
<th>Year</th>
<th>Total</th>
<th>Early College</th>
<th>In-State</th>
<th>Out-of-State</th>
<th>Total</th>
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<tr>
<td>2011</td>
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<td>2012</td>
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<td>2014</td>
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<tr>
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<tr>
<td>2016</td>
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<td>2017</td>
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<td>2018</td>
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<td>2019</td>
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FY 2021 Outlook: Enrollment Projection

Total Census Credit Hours

- Undergraduate
- Graduate

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<th>Year</th>
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<th>Graduate</th>
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<tr>
<td>2011</td>
<td>167,743</td>
<td>28,142</td>
</tr>
<tr>
<td>2012</td>
<td>167,191</td>
<td>27,663</td>
</tr>
<tr>
<td>2013</td>
<td>158,454</td>
<td>25,834</td>
</tr>
<tr>
<td>2014</td>
<td>147,817</td>
<td>25,671</td>
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<td>2015</td>
<td>139,540</td>
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<td>2016</td>
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<td>2017</td>
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<td>2018</td>
<td>150,382</td>
<td>25,359</td>
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<td>2019</td>
<td>150,892</td>
<td>24,628</td>
</tr>
<tr>
<td>2020</td>
<td>152,361</td>
<td>25,081</td>
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</table>
### Fall 2019 Enrollment Comparison

Comparative Degree-Seeking/Non-degree Enrollment Summary by Level

10/15/2019 - Census (Reconciled with UMS Census Data)

(Source: Campus Solutions)

<table>
<thead>
<tr>
<th></th>
<th>All Students</th>
<th>Matriculated Students</th>
<th>Non-Degree Students</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10/15/19</td>
<td>10/15/18</td>
<td>10/15/17</td>
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<td></td>
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</tr>
<tr>
<td>UGRD</td>
<td>6675</td>
<td>6390</td>
<td>6110</td>
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<tr>
<td>GRAD</td>
<td>1197</td>
<td>1147</td>
<td>1143</td>
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<tr>
<td>LAW</td>
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<td>253</td>
<td>241</td>
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<td><strong>Total</strong></td>
<td>8429</td>
<td>8140</td>
<td>7794</td>
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<td><strong>Credit Hours</strong></td>
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<td></td>
</tr>
<tr>
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<td>72167.5</td>
<td>70950.0</td>
<td>68897.0</td>
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<td>9607.0</td>
<td>9922.2</td>
<td>9743.6</td>
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<tr>
<td>LAW</td>
<td>3644.0</td>
<td>3699.0</td>
<td>3427.0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>85438.5</td>
<td>84841.2</td>
<td>81287.6</td>
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<tr>
<td><strong>FTE</strong></td>
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<tr>
<td>UGRD</td>
<td>4811.17</td>
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<td>4579.80</td>
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<td>GRAD</td>
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<td>1105.83</td>
<td>1086.06</td>
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<tr>
<td>LAW</td>
<td>244.27</td>
<td>246.60</td>
<td>228.47</td>
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<td><strong>Total</strong></td>
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<tr>
<td>UGRD</td>
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<td>11.10</td>
<td>11.34</td>
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<tr>
<td>GRAD</td>
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<td>6.65</td>
<td>6.77</td>
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<tr>
<td>LAW</td>
<td>14.28</td>
<td>14.62</td>
<td>14.22</td>
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<td><strong>Total</strong></td>
<td>10.14</td>
<td>10.39</td>
<td>10.51</td>
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</table>

![Headcount Comparison](image1)

![Headcount Comparison Matriculated Students](image2)

![Headcount Comparison Non-Degree Students](image3)

---

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## Spring 2020 Enrollment Comparison
Comparative Degree-Seeking/Non-degree Enrollment Summary by Level
2/10/2020 Start of Week 4
(Source: Campus Solutions)

### Headcount

<table>
<thead>
<tr>
<th>All Students</th>
<th>Matriculated Students</th>
<th>Non-Degree Students</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>02/10/20</td>
<td>02/11/19</td>
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<tr>
<td>Headcount</td>
<td>02/10/20</td>
<td>02/11/19</td>
</tr>
<tr>
<td>UGRD</td>
<td>5675</td>
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<td>GRAD</td>
<td>1440</td>
<td>1495</td>
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<td>LAW</td>
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<td>Total</td>
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<tr>
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<td>Total</td>
<td>78953.0</td>
<td>79906.0</td>
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### FTE

<table>
<thead>
<tr>
<th>All Students</th>
<th>Matriculated Students</th>
<th>Non-Degree Students</th>
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</thead>
<tbody>
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<td></td>
<td>02/10/20</td>
<td>02/11/19</td>
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<tr>
<td>FTE</td>
<td>02/10/20</td>
<td>02/11/19</td>
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<tr>
<td>UGRD</td>
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<td>GRAD</td>
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<td>LAW</td>
<td>232.20</td>
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<td>6698.71</td>
<td>7023.89</td>
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</table>

### Crd Hrs/Student

<table>
<thead>
<tr>
<th>All Students</th>
<th>Matriculated Students</th>
<th>Non-Degree Students</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>02/10/20</td>
<td>02/11/19</td>
</tr>
<tr>
<td>Crd Hrs/Student</td>
<td>02/10/20</td>
<td>02/11/19</td>
</tr>
<tr>
<td>UGRD</td>
<td>11.61</td>
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<td>GRAD</td>
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<td>6.56</td>
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<tr>
<td>LAW</td>
<td>13.99</td>
<td>14.44</td>
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<tr>
<td>Total</td>
<td>10.69</td>
<td>10.66</td>
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</tbody>
</table>

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### Charts

- **Headcount Comparison All Students**
- **Headcount Comparison Matriculated Students**
- **Headcount Comparison Non-Degree Students**
5 Year Academic Profile by High School GPA Quartiles
Early College Update

Fall 2019

• **4,769 CH** (54% increase from Fall 2018, 3,087 CH)

• **Concurrent Enrollment** (in high school classroom with HS teacher, earning USM credit): 859 Headcount (65.5% increase over Fall 2018)
  – All students participating in concurrent enrollment courses at publicly funded Maine high schools were able to opt in to receive USM credit without a fee, making the college credit 100% free.

• **Aspirations** (Students on-campus or online): 239 Headcount (20% increase over Fall 2018)
  – 31 different high schools and several homeschool students.

• **35 Dual Enrollment Partner schools, five new in FY20:**
  – Gorham High School: French, Spanish, and Chinese
  – Baxter Academy: Calculus-based Physics
  – Casco Bay HS: Environmental Science with a lab
  – Lake Region Vocational Technical Education: Nursing 100
  – Messalonskee: Latin
Retention: Up 7% in 5 years (2015-2020)

• Dual Advising Model (Provost direct report)
  – 90 minute mandatory Advising and Course Selection (ACS) sessions for incoming students
  – Investment in advisors to approach national model of 250 students per advisor
  – NACADA Excellence in Academic Advising Assessment Program
  – Discretionary PTR increases for excellence in academic advising
  – Revised PTR template that includes advising
  – Career ladder for professional staff advisors

• Learning Assistants Program: $200,000 (flipped classrooms with peer tutors)

• Meta-Majors Implementation (beginning this fall)

• Math Pathway Program
  – Supplemental instruction
  – Removal of mandatory non-credit bearing developmental courses
  – Removal of placement testing

• Director of Retention Initiatives: $115,500 (Provost direct report)

• Learning Commons Subject Based Tutoring & Writing Assistance: $120,000
  – Investment in net new learning commons staff
Retention, continued

- Technology Assistance & Peer Academic Coaching: $10,000
- Make the Grade Initiative: $25,000
- Campus Food Pantry
- Recovery Oriented Campus Center
- Revision of First Year Experience: EYE, ENG 100 (underway)
- Intercultural and Diversity Advisory Council Student Fellows
- Common Read *How To Be An Antiracist* (Kendi, 2019)
- 15 to Finish Campaign
- Student Emergency Fund
- ROCC Scholarship: $25,000
- $1,000 Student Balance Hold Release Campaign
- TRIO Programs (Student Support Services, Upward Bound, Veterans Upward Bound, USM Bridge Program): $1.2m
- Veteran Promise Finish line Funds: $500,000
- AL360 Survey & Action plan to improve adult learning experience
New Fall Undergraduate Enrollment

- **Cultivated Prospects & Inquiries**
  - (Marketing/Admissions)
  - (6,727 Total, Up 13%)
    - up 34% for out-of-state, 2,576
    - (5,184 Admitted, Up 9%)
  - (4,463 Total, Up 7%)
- **Applications**
- **Admitted Students**
- **FAFSA Submissions**
- **Enrolled**

(1,633 Total, down 3%)

14 fewer out-of-state students
40 fewer in-state students

Academic Profile of Class
*First Year GPA up to 3.2*
*Transfer GPA up to 3.17*
Average Undergraduate Debt Incurred at USM by Graduation Year
Average Debt of Undergraduates at New England Public Universities

1. The Institute for College Access & Success: Student Debt and the Class of 2018
Merit Aid Award Disbursement by Residency (All Students)
Merit Award Offered/Accepted/Disbursed by Residency - Incoming Students

<table>
<thead>
<tr>
<th>Year</th>
<th>In State</th>
<th>Out of State</th>
<th>NEBHE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>$219,000</td>
<td>$111,000</td>
<td>$69,750</td>
</tr>
<tr>
<td>2019</td>
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</tr>
<tr>
<td>2020</td>
<td>$809,000</td>
<td>$201,500</td>
<td>$145,500</td>
</tr>
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</table>
Intercultural Student Engagement

Update on staffing plan for temporary position(s)

• Call for Applications/Referrals
• Received dozens of inquiries and referrals
• Materials reviewed by staff and ISE Student Diversity Group
• Selected candidates for on-campus interviews (driven by student feedback)
• Candidates will interview with students and staff
• Interviews are currently being scheduled
• Goal of bringing one or more individuals on staff this spring (ASAP) to assist with student engagement efforts and programming
Intercultural Student Engagement

Update on National Search for the ISE Director Position:

• Working with students, faculty, staff, and HR to update position description and job posting
• Identify and Recruit Core Search Committee Members (including students)
• Establish a Strategic Networking and Recruitment Plan
• Advertise position in early March - selecting publications to attract a diverse and talented applicant pool
• Informational Interviews at NASPA National Conference
• Phone interviews and campus interviews in April (significant student involvement)
• Extend Employment Offer in early May
• Candidate Start Date – late June/early July