

E&E2.0 Status Report November 2016

A bit of background

E&E in the USM was initially inaugurated in 2003 as a set of campus based initiatives with some multi-institutional initiatives such as leveraged energy purchase and Course Redesign. It was overseen by a BOR Committee. At the Fall 2014 Board Retreat, Chairman Shea announced that there would be a renewal of the E&E initiative, E&E2.0. It was to be overseen by a BOR Work Group with the Chancellor and Presidents taking the operational lead. Supporting this is an E&E2.0 USM Leadership Group that meets regularly, to develop new initiatives, monitor existing initiatives, and connect the System activities to the campus E&E activities. There has been a robust process for reporting, categorizing, and assessing on-going campus E&E activities that was begun in 2003 and continued.

E&E2.0

In this new context, there are E&E activities and initiatives at multiple levels. The largest number, and in terms of efficiency garnering the greatest value, are **campus based activities**. Across the System, there are many hundreds of these that are documented each year. They range in assessed value from \$1,000 to several millions of dollars. As an example, a major effort has been in energy savings. It is estimated that since the inception of the program USM institutions have collectively saved \$93M in this area alone. Additionally, there has been approximately \$20M in cost avoidance due to campus energy related improvements. Cumulatively since the initiation of E&E initiatives in 2003 through FY2016 institutions have saved over \$930M.

The process has been changed in 2016 to broaden the assessment and input to include more academic related improvements. Also, the process going forward will include a preliminary assessment in mid-year, feedback regarding activities that might be applied more broadly than just the reporting institution, and then a final retrospective collection at the end of the year. For FY 2016, there was a combined total of over \$80M in auditable efficiency improvements reported.

The E&E accountability program has started to assess the E&E impact on **shared campus initiatives** that impact several, but not necessarily all, institutions. Some of these, such as sharing software licensing opportunities or technology services are easily documented. Others, such as sharing academic programs, have perceived E&E value, but a valuation method has not yet been developed. In FY 2016, those activities that have been documented are perceived to have saved participating institutions \$3M.

A third level of E&E activity that is captured in the accountability measure is that of **consortia**, which are hosted by the USM. These include Maryland Education Enterprise Consortium (MEEC) that focuses on highly leveraged contracts for IT products and services for all Maryland education and libraries; Maryland Research

and Education Network (MDREN) that focuses on wide area networking and related services, again for all Maryland education; and the USMAI consortium of 4-year institutional libraries. While these include many institutions outside of the USM, the combined calculated value of savings *just for USM institutions* of these consortia is approximately \$25M per year.

Finally, under E&E2.0 there is a substantial list of multi-institutional initiatives. These are overseen by the USM Leadership Group. “Multi-institutional” does not mean “all,” just 2 or more, but several of the initiatives are all inclusive.

Current Multi-institutional Initiatives

- Procurement
 - Scope----All USM institutions
 - Review and Revise USM Procurement Policies and Procedures
 - Status----Revisions approved by BOR and went into effect July 1, 2016
 - Training materials for USM Procurement staff are being developed
 - Review and standardize contract terms and conditions
 - Status---subgroup formed and hopes to make recommendations by end of semester.
 - N.B. There is a Governor’s Commission to modernize state procurement, which includes this issue. USM subgroup is monitoring state discussions
 - Strategies to Streamline BPW Approval of General Obligation (GO) Funded Items
 - Status----Internally discussed and garnered internal support. Developing action plan to work with BPW staff
 - Streamline Approval Process for Excess Expenditures on SFCP Projects
 - Status---Recommendations approved by BOR Finance Committee
 - Proposed Revisions in USM Construction Service Center Guide
 - Status----largely done
 - Explore Feasibility and Benefits of e-Procurement Systems, and Recommend Next Steps
 - Status----UMCP has an RFP process underway that will include the ability of other institutions to purchase from the resulting contract. Representatives from other institutions are on the RFP team. Interested parties from across the System are invited to vendor presentations in October.
 - Placeholder technology for finding and sharing shareable contracts across institutions

- Status-----The Library Consortium, USMAI, has a document repository in place and is hosting the shared contracts for the Procurement Officers.
- More Effective Use of Analytics
 - Analytics in support of student success
 - Scope----individual institution for some initiatives and all for others
 - Status-----Several initiatives underway at both the institutional and System level
 - Administrative uses of Analytics to improve decision making and business processes
 - Status----opportunities being explored and strategy being defined
- ERP (think Peoplesoft at many institutions) Futures
 - Align HR and Financial business processes at “like” institutions
 - Scope---TU leading, BSU, CSU, FSU, SU, UB
 - N.B., UMCES and UMES get these services from UMCP
 - Status----Business Process analysis by consulting firm getting underway
 - Identify and license next generation ERP
 - Status----sometime in the next 3-5 years
- HR processes
 - Faculty Retirement Programs
 - Scope----all USM institutions
 - Status----keep on the front burner and revise as necessary
 - Tuition Remission Process
 - Scope----all USM institutions
 - Status----developing a common methodology and technical support
- Differential Tuition
 - Status----implemented at UMCP
- Promote Zero-cost Instructional Materials
 - Scope----all USM institutions
 - Status---
 - Continuing to promote adoption of open educational resources (OER) as appropriate through the Maryland Open Source Textbook (MOST) initiative (almost \$1M in textbook cost savings to date).
 - Discussions underway between Kirwan Center for Academic Innovation (KCAI) and USMAI to explore use of online repository as vehicle for distributing OER materials.
 - KCAI collaborating with UMUC to explore new models of scaling up and supporting OER adoption that can be more sustainable.