



Finance & Operations Committee

June 2024

June 13, 2024

9:30 a.m.

Boardroom, McNamara Alumni Center

FIN - JUNE 2024

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BOARD OF REGENTS DOCKET ITEM SUMMARY

Finance & Operations

June 13, 2024

AGENDA ITEM: Collective Bargaining Agreements

Review

Review + Action

Action

Discussion

This is a report required by Board policy.

PRESENTERS: Kenneth Horstman, Vice President, Human Resources

PURPOSE & KEY POINTS

The purpose of this item is for the committee to review and act on the following collective bargaining agreements (CBA) between the Regents of the University of Minnesota and:

- A. Printing, Packaging & Production Workers Union of North America, Local 1-B
- B. Printing, Packaging & Production Workers Union of North America, Local 1-M
- C. International Brotherhood of Electrical Workers (IBEW), Local 292

A. Printing, Packaging & Production Workers Union of North America, Local 1-B

Covered Employees

The employees covered by this CBA are bindery workers employed on the Twin Cities campus and included in University of Minnesota Unit 2 as defined by the Minnesota Public Employee Labor Relations Act. The total number of employees is 2.

Key Contractual Highlights

- Employees may bank more vacation time over a two-year period.
- Employees accrue vacation each pay period according to years of service.
- A probationary period is established for new and experienced employees.

Summary Economic Highlights

Employees are coming on to the University's Total Rewards benefits program, effective July 1, 2024.

Financial Impact

This is a three-year agreement from July 1, 2024, through June 30, 2027.

Year 1 Recurring Costs

Base Annual Payroll (from PP 21 FY24)	\$ 110,910.80
Base Salary Adjustments of 3 percent	+ \$ 3,327.32
Total Recurring Cost	\$ 114,238.12

Estimated Year 2 Recurring Costs

Base Annual Payroll	\$ 114,238.12
Base Salary Adjustments	+ \$ (FY26 salary memo percentage)
Total Recurring Cost	\$ 114,238.12 plus

Estimated Year 3 Recurring Costs

Base Annual Payroll	\$ 114,238.12 plus
Base Salary Adjustments	+ \$ (FY27 salary memo percentage)
Total Recurring Cost	\$ 114,238.12 plus

Negotiation Timeline

Negotiations began on March 20, 2024. The parties reached a tentative agreement on May 24, 2024. The Union completed its contract ratification process on May 24, 2024.

B. Printing, Packaging & Production Workers Union of North America, Local 1-M

Covered Employees

The employees covered by this CBA are printers employed on the Twin Cities campus and included in University of Minnesota Unit 2 as defined by the Minnesota Public Employee Labor Relations Act. The total number of employees is 2.

Key Contractual Highlights

- Employees may bank more vacation time over a two-year period.
- Employees accrue vacation each pay period according to years of service.

Summary Economic Highlights

Employees are coming on to the University's Total Rewards benefits program, effective July 1, 2024.

Financial Impact

This is a three-year agreement from July 1, 2024, through June 30, 2027.

Year 1 Recurring Costs

Base Annual Payroll (from PP 21 FY24)	\$ 111,602.40
Base Salary Adjustments of 3 percent	+ \$ 3,348.07
Total Recurring Cost	\$ 114,950.47

Estimated Year 2 Recurring Costs

Base Annual Payroll	\$ 114,950.47
Base Salary Adjustments	+ \$ (FY26 salary memo percentage)
Total Recurring Cost	\$ 114,950.47 plus

Estimated Year 3 Recurring Costs

Base Annual Payroll	\$ 114,950.47 plus
Base Salary Adjustments	+ \$ <u>(FY27 salary memo percentage)</u>
Total Recurring Cost	\$ 114,950.47 plus

Negotiation Timeline

Negotiations began on March 20, 2024. The parties reached a tentative agreement on May 24, 2024. The Union completed its contract ratification process on May 24, 2024.

C. International Brotherhood of Electrical Workers (IBEW), Local 292

Covered Employees

The employees covered by this CBA are radio and broadcast technicians employed on the Twin Cities campus and included in University of Minnesota Unit 2 as defined by the Minnesota Public Employee Labor Relations Act. The total number of employees is 1.

Key Contractual Highlights

- No language changes to the collective bargaining agreement.
- 3-year agreement (2024 – 2027)

Summary Economic Highlights

- Wage increases will be in accordance with the Employer's spring salary pool amounts for years 1, 2, and 3 of the contract.

Financial Impact

This is a three-year agreement from June 17, 2024, through June 30, 2027.

Year 1 Recurring Costs

Base Annual Payroll (from PP 21 FY24)	\$ 71,531
Base Salary Adjustments of 3 percent	+ \$ <u>2,145</u>
Total Recurring Cost	\$ 73,676

Estimated Year 2 Recurring Costs

Base Annual Payroll	\$ 73,676
Base Salary Adjustments	+ \$ <u>(FY26 salary memo percentage)</u>
Total Recurring Cost	\$ 73,676 plus

Estimated Year 3 Recurring Costs

Base Annual Payroll	\$ 73,676 plus
Base Salary Adjustments	+ \$ <u>(FY27 salary memo percentage)</u>
Total Recurring Cost	\$ 73,676 plus

Negotiation Timeline

Negotiations began on May 8, 2024. The parties reached a tentative agreement on May 15, 2024. The Union completed its contract ratification process on May 30, 2024.

INTERIM PRESIDENT'S RECOMMENDATION

The Interim President recommends approval of the following collective bargaining agreements:

- A. Printing, Packaging & Production Workers Union of North America, Local 1-B
- B. Printing, Packaging & Production Workers Union of North America, Local 1-M
- C. International Brotherhood of Electrical Workers (IBEW), Local 292



REGENTS OF THE UNIVERSITY OF MINNESOTA

RESOLUTION RELATED TO

**The Proposed Labor Agreement with the Printing, Packaging & Production
Workers Union of North America, Local 1-B**

WHEREAS, the parties have met and negotiated and have reached agreement regarding terms and conditions of employment regarding the employees of this bargaining unit; and

WHEREAS, the Printing, Packaging & Production Workers Union of North America, Local 1-B has ratified acceptance of this agreement; and

WHEREAS, according to Board of Regents Policy: *Reservation and Delegation of Authority*, approval of labor agreements by the Board of Regents is required.

NOW, THEREFORE, BE IT RESOLVED that on the recommendation of the Interim President, the Board of Regents approves this labor agreement as outlined in the Finance & Operations Committee docket for June 13, 2024.



REGENTS OF THE UNIVERSITY OF MINNESOTA

RESOLUTION RELATED TO

**The Proposed Labor Agreement with the Printing, Packaging & Production
Workers Union of North America, Local 1-M**

WHEREAS, the parties have met and negotiated and have reached agreement regarding terms and conditions of employment regarding the employees of this bargaining unit; and

WHEREAS, the Printing, Packaging & Production Workers Union of North America, Local 1-M has ratified acceptance of this agreement; and

WHEREAS, according to Board of Regents Policy: *Reservation and Delegation of Authority*, approval of labor agreements by the Board of Regents is required.

NOW, THEREFORE, BE IT RESOLVED that on the recommendation of the Interim President, the Board of Regents approves this labor agreement as outlined in the Finance & Operations Committee docket for June 13, 2024.



REGENTS OF THE UNIVERSITY OF MINNESOTA

RESOLUTION RELATED TO

The Proposed Labor Agreement with the International Brotherhood of Electrical Workers (IBEW), Local 292, Broadcast Technicians

WHEREAS, the parties have met and negotiated and have reached an agreement regarding terms and conditions of employment regarding the employees of this bargaining unit; and

WHEREAS, the IBEW, Local 292, Broadcast Technicians has ratified acceptance of this agreement; and

WHEREAS, according to Board of Regents Policy: *Reservation and Delegation of Authority*, approval of labor agreements by the Board of Regents is required.

NOW, THEREFORE, BE IT RESOLVED that on the recommendation of the Interim President, the Board of Regents approves this labor agreement as outlined in the Finance & Operations Committee docket for June 13, 2024.



BOARD OF REGENTS DOCKET ITEM SUMMARY

Finance & Operations

June 13, 2024

AGENDA ITEM: Interim President's Recommended FY 2025 Annual Capital Improvement Budget

Review

Review + Action

Action

Discussion

This is a report required by Board policy.

PRESENTERS: Interim President Jeffrey Ettinger
Alice Roberts-Davis, Vice President, University Services

PURPOSE & KEY POINTS

The purpose of this item is to act on the Interim President’s Recommended FY 2025 Annual Capital Improvement Budget (capital budget). The University’s FY 2025 capital budget authorizes projects totaling \$81,251,000 to begin design and construction during the upcoming fiscal year.

Since it was reviewed at the May meeting, the capital budget has been updated to reflect the outcome of the 2024 legislative session. The Minnesota Legislature did not pass legislation providing any funds for Higher Education Asset Preservation and Replacement (HEAPR).

The capital budget includes the planning priorities established by the Six-Year Capital Plan, which the Board acts on annually in the fall. Additionally, funding pools categorized as Repair and Replacement (R&R) or Higher Education Asset Preservation and Replacement (HEAPR) include multiple projects intended to preserve and renew existing campus facilities. Projects funded by these dollars are intended to extend the life and functionality of existing University facilities and infrastructure.

BACKGROUND INFORMATION

Board of Regents Policy: *Board Operations and Agenda Guidelines* directs the administration to conduct capital planning using a six-year time horizon updated annually. This annual capital planning process is completed in two parts.

- Part 1 is the Six-Year Capital Plan, which is updated annually and establishes the institution’s capital priorities. This plan is the basis for continued capital and financial planning. The Six-Year Capital Plan is presented to the Board annually in the fall.
- Part 2, which is acted on by the Board in June, is the Annual Capital Improvement Budget. The capital improvement budget identifies projects with completed predesigns, financing

plans, and grants approval for those projects to proceed with design and construction for the coming fiscal year.

The University requires that all capital projects spending more than \$5,000,000 on either design or construction be included in the capital budget. This is an increase from the previous threshold of \$1,000,000 based on the amendments to Board of Regents Policy: *Reservation and Delegation of Authority* that were approved by the Board at the March 2024 meeting. In order to be included in the capital budget, the project must be approved by the respective chancellor or vice president, have completed an appropriate level of planning (typically a predesign), have all the required funding identified, and be ready to proceed if approved by the Board. These requirements lead to better projects but exclude from the capital budget some important projects still in development. As these projects meet the Board's criteria, they will be presented as capital budget amendments.

INTERIM PRESIDENT'S RECOMMENDATION

The Interim President recommends approval of the resolution related to FY 2025 Annual Capital Improvement Budget.



REGENTS OF THE UNIVERSITY OF MINNESOTA

RESOLUTION RELATED TO

FY 2025 Annual Capital Improvement Budget

WHEREAS, the Board of Regents (Board) has directed the administration to annually submit a six-year capital improvement plan and an annual capital improvement budget; and

WHEREAS, the Board has adopted principles to guide the formulation of the six-year capital plan and the annual capital improvement budget; and

WHEREAS, the Board recognizes the importance of sustaining and improving the University's facilities in support of teaching, research, and outreach; and

WHEREAS, the administration has developed a capital planning framework designed to focus its capital planning efforts on projects that support the University's institutional priorities with a realistic financial strategy.

NOW, THEREFORE, BE IT RESOLVED that the Board approves the FY 2025 Annual Capital Improvement Budget.

University of Minnesota

FY 2025 Annual Capital Budget - June 2024

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Board of Regents Policy: Reservation and Delegation of Authority

The Board reserves to itself, or to one of its committees, authority to approve annual capital budgets consisting of projects with a value of \$5,000,000 or more.
[Article I. Reservation of Authority; Section VIII. Property, Facilities, and Capital Budgets. Subd. 7.]

Report Summary: Definitions and Totals by Funding Source

(dollars in thousands)

Local Funds	
These funds have been allocated to or generated by campus-level, collegiate-level or departmental-level units. Local funds include state appropriations, tuition, internal sales, external sales and other unrestricted funds.	\$75,001
Grants / Gifts	
Grant and gift funds are provided to the University to support specific construction projects.	\$0
Institutional Funds	
This category of resources represents a broad array of funds from within the University including but not limited to central budget allocations for specific projects, and internal loans.	\$0
State Funds	
These funds are provided from State sold bond proceeds and/or cash reserves for use on legislatively authorized projects.	\$0
University Debt	
These funds come from the future sale or allocation of bonds and/or commercial paper issued by the University. The source of the debt service payment varies by project. Board of Regents approval will be sought when funds are to be allocated from the Long-Term Capital Financing Program.	\$6,250
	<hr/> \$81,251

University of Minnesota

FY 2025 Annual Capital Budget

June 2024; dollars in thousands

Capital Projects		Total	Local Funds	Grants / Gifts	Institutional Funds	State Funds	University Debt	Description
Project	IT Staff Relocation	\$6,250	\$0	\$0	\$0	\$0	\$6,250	This project will renovate space in the University Park Plaza building for OIT staff being relocated from the Information Technology building in conjunction with the new Advanced Operations Center.
VP Unit	Finance and Operations							
RRC	Information Technology							
Facility	University Park Plaza							
Campus	UMN Twin Cities							
	Grand Total:	\$6,250	\$0	\$0	\$0	\$0	\$6,250	
	Running Total:	\$6,250	\$0	\$0	\$0	\$0	\$6,250	

University of Minnesota

FY 2025 Annual Capital Budget

June 2024; dollars in thousands

R&R Funds		Total	Local Funds	Grants / Gifts	Institutional Funds	State Funds	University Debt	Description
Project	R&R - UMC Campus	\$319	\$319	\$0	\$0	\$0	\$0	Authorized funds will be used for facility and infrastructure repair and replacement projects on the Crookston campus.
VP Unit	UMN Crookston							
RRC	UMN Crookston							
Facility	Campuswide							
Campus	UMN Crookston							
Project	R&R - UMD Campus	\$4,000	\$4,000	\$0	\$0	\$0	\$0	Authorized funds will be used for facility and infrastructure repair and replacement projects on the Duluth campus.
VP Unit	UMN Duluth							
RRC	UMN Duluth							
Facility	Campuswide							
Campus	UMN Duluth							
Project	R&R - UMD Student Life	\$9,500	\$9,500	\$0	\$0	\$0	\$0	Authorized funds will be used for facility and infrastructure repair and replacement projects in residence halls, apartments, and other student service facilities on the Duluth campus.
VP Unit	UMN Duluth							
RRC	UMN Duluth							
Facility	Campuswide							
Campus	UMN Duluth							
Project	R&R - UMM Campus	\$194	\$194	\$0	\$0	\$0	\$0	Authorized funds will be used for facility and infrastructure repair and replacement projects on the Morris campus.
VP Unit	UMN Morris							
RRC	UMN Morris							
Facility	Campuswide							
Campus	UMN Morris							
Project	R&R - Student Affairs	\$1,250	\$1,250	\$0	\$0	\$0	\$0	Authorized funds will be used for facility and infrastructure repair and replacement projects for Boynton, Recreation and Wellness, and Student Unions and Activities.
VP Unit	Academic Affairs							
RRC	Student Affairs							
Facility	Campuswide							
Campus	UMN Twin Cities							
Project	R&R - Housing & Residential Life	\$12,266	\$12,266	\$0	\$0	\$0	\$0	Authorized funds will be used for facility and infrastructure repair and replacement projects in the residence halls, apartments and family student housing units on the Twin Cities campus.
VP Unit	Finance and Operations							
RRC	Auxiliary Services							
Facility	Campuswide							
Campus	UMN Twin Cities							

University of Minnesota

FY 2025 Annual Capital Budget

June 2024; dollars in thousands

R&R Funds		Total	Local Funds	Grants / Gifts	Institutional Funds	State Funds	University Debt	Description
Project	R&R - Parking Infrastructure	\$9,850	\$9,850	\$0	\$0	\$0	\$0	Authorized funds will be used for parking infrastructure repair and replacement projects to include: structural, electrical, plumbing, HVAC and other critical repairs within structured parking and surface parking assets.
VP Unit	Finance and Operations							
RRC	Auxiliary Services							
Facility	Campuswide							
Campus	UMN Twin Cities							
Project	R&R - Transportation Infrastructure	\$5,200	\$5,200	\$0	\$0	\$0	\$0	Authorized funds will be used for transportation infrastructure repair and replacement projects to include: street projects, sidewalk projects, bridge projects, building linkages, campus safety upgrades and critical repairs identified within transportation assets.
VP Unit	Finance and Operations							
RRC	Auxiliary Services							
Facility	Campuswide							
Campus	UMN Twin Cities							
Project	R&R - University Dining Services	\$1,100	\$1,100	\$0	\$0	\$0	\$0	Authorized funds will be used for facility and infrastructure repair and replacement projects in retail food venues on the Twin Cities campus.
VP Unit	Finance and Operations							
RRC	Auxiliary Services							
Facility	Campuswide							
Campus	UMN Twin Cities							
Project	R&R - Energy Conservation	\$4,200	\$4,200	\$0	\$0	\$0	\$0	Authorized funds will be used to enhance the energy efficiency of facilities and infrastructure on the Twin Cities campus. Facilities Management maintains a revolving internal loan fund with the Budget Office to fund and repay conservation projects.
VP Unit	Finance and Operations							
RRC	Facilities Management							
Facility	Campuswide							
Campus	UMN Twin Cities							
Project	R&R - Twin Cities Campus	\$11,710	\$11,710	\$0	\$0	\$0	\$0	Authorized funds will be used for facility and infrastructure repair and replacement projects on the Twin Cities campus.
VP Unit	Finance and Operations							
RRC	Facilities Management							
Facility	Campuswide							
Campus	UMN Twin Cities							
Project	R&R - Utility Infrastructure	\$12,737	\$12,737	\$0	\$0	\$0	\$0	Authorized funds will be used for utility infrastructure repair and replacement projects on the Twin Cities campus.
VP Unit	Finance and Operations							
RRC	Facilities Management							
Facility	Campuswide							
Campus	UMN Twin Cities							

University of Minnesota

FY 2025 Annual Capital Budget

June 2024; dollars in thousands

R&R Funds		Total	Local Funds	Grants / Gifts	Institutional Funds	State Funds	University Debt	Description
Project	R&R - Security Infrastructure	\$675	\$675	\$0	\$0	\$0	\$0	Authorized funds will be used for facility and infrastructure repair and replacement projects related to security infrastructure on the Twin Cities campus.
VP Unit	Finance and Operations							
RRC	Public Safety							
Facility	Campuswide							
Campus	UMN Twin Cities							
Project	R&R - Athletics	\$2,000	\$2,000	\$0	\$0	\$0	\$0	Authorized funds will be used for facility and infrastructure repair and replacement projects in competition and practice facilities.
VP Unit	Intercollegiate Athletics							
RRC	Intercollegiate Athletics							
Facility	Campuswide							
Campus	UMN Twin Cities							
Grand Total:		\$75,001	\$75,001	\$0	\$0	\$0	\$0	
Running Total:		\$81,251	\$75,001	\$0	\$0	\$0	\$6,250	

University of Minnesota

FY 2025 Annual Capital Budget

June 2024

Potential Additions

Potential Additions have not yet met the readiness threshold for inclusion in the Capital Budget but may be added later in the fiscal year by amendment

Project	VP Unit	RRC	Facility	Campus
Advanced Research and Diagnostics Lab (ARDL)	Health Sciences	Medical School	Campuswide	UMN Twin Cities
Coffman Union Dining Updates	Finance and Operations	Auxiliary Services	Coffman Memorial Union	UMN Twin Cities
Community-University Health Care Center (CUHCC)	Health Sciences	Office of Academic Clinical Affairs	New Facility	UMN Twin Cities
Energy Efficiency Improvements	Finance and Operations	University Services	Campuswide	UMN Twin Cities
Labovitz School of Business Sales Center Renovation	UMN Duluth	UMN Duluth	Library Annex	UMN Duluth
Microbial Cell Production Facility Tenant Improvements	Academic Affairs	Multiple RRCs	Microbial Cell Production Facility	UMN Twin Cities
St Paul Campus Center	Academic Affairs	Student Affairs	New Facility	UMN Twin Cities
UMTC Solar Energy Projects	Finance and Operations	University Services	Campuswide	UMN Twin Cities

Interim President's FY 2025 Recommended Annual Capital Improvement Budget

Interim President Jeff Ettinger

Alice Roberts-Davis, Vice President, University Services

Finance & Operations Committee

June 13, 2024

SENIOR VICE PRESIDENT FOR FINANCE AND OPERATIONS

World Class Services for a World Class University



University Services

Stewardship • Integrity
Respect • Innovation • Safety

Annual Capital Improvement Budget

- Includes individual projects over \$5,000,000
- Projects need to have a completed predesign
- Projects must be fully funded
- Approved projects move into design and/or construction



Proposed FY 2025 Annual Capital Improvement Budget \$81.3 million

(dollars in millions)

Category	State	U of MN	Total
State Capital Request	\$0.0	\$0.0	\$0.0
University Funded Projects	-	\$6.3	\$6.3
Repair and Replacement (R&R) Funds	-	\$75.0	\$75.0
Total FY 2025 Capital Improvement Budget	\$0.0	\$81.3	\$81.3

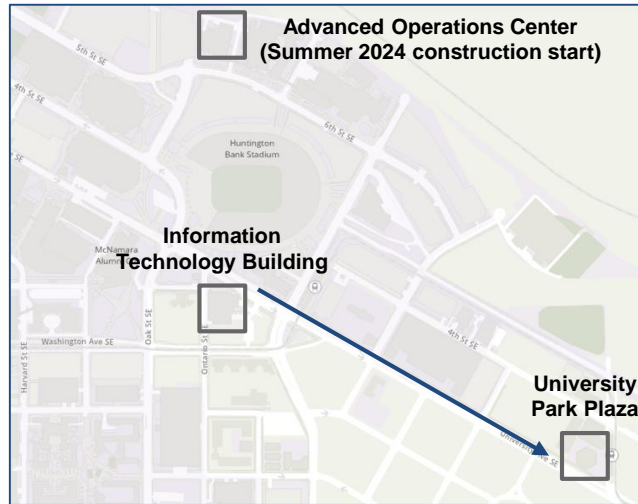


Capital Projects

\$6.3 million

(dollars in millions)

Location	Project	State	U of MN	Total
UMTC	IT Staff Relocation	\$0	\$6.3	\$6.3
		Total	\$6.3	\$6.3



Repair and Replacement Pools \$75.0 million

(dollars in millions)

Location	Project	Total
UMTC	R&R - Utility Infrastructure	\$12.7
UMTC	R&R - Housing and Residential Life	\$12.3
UMTC	R&R - Twin Cities Campus	\$11.7
UMTC	R&R - Parking Infrastructure	\$9.9
UMD	R&R - UMD Student Life	\$9.5
UMTC	R&R - Transportation Infrastructure	\$5.2
UMTC	R&R - Energy Conservation	\$4.2
UMD	R&R - UMD Campus	\$4.0
UMTC	R&R - Athletics	\$2.0
UMTC	R&R - Student Affairs	\$1.3
UMTC	R&R - University Dining Services	\$1.1
UMTC	R&R - Security Infrastructure	\$0.7
UMC	R&R - UMC Campus	\$0.3
UMM	R&R - UMM Campus	\$0.2
	Total	\$75.0



Potential Additions

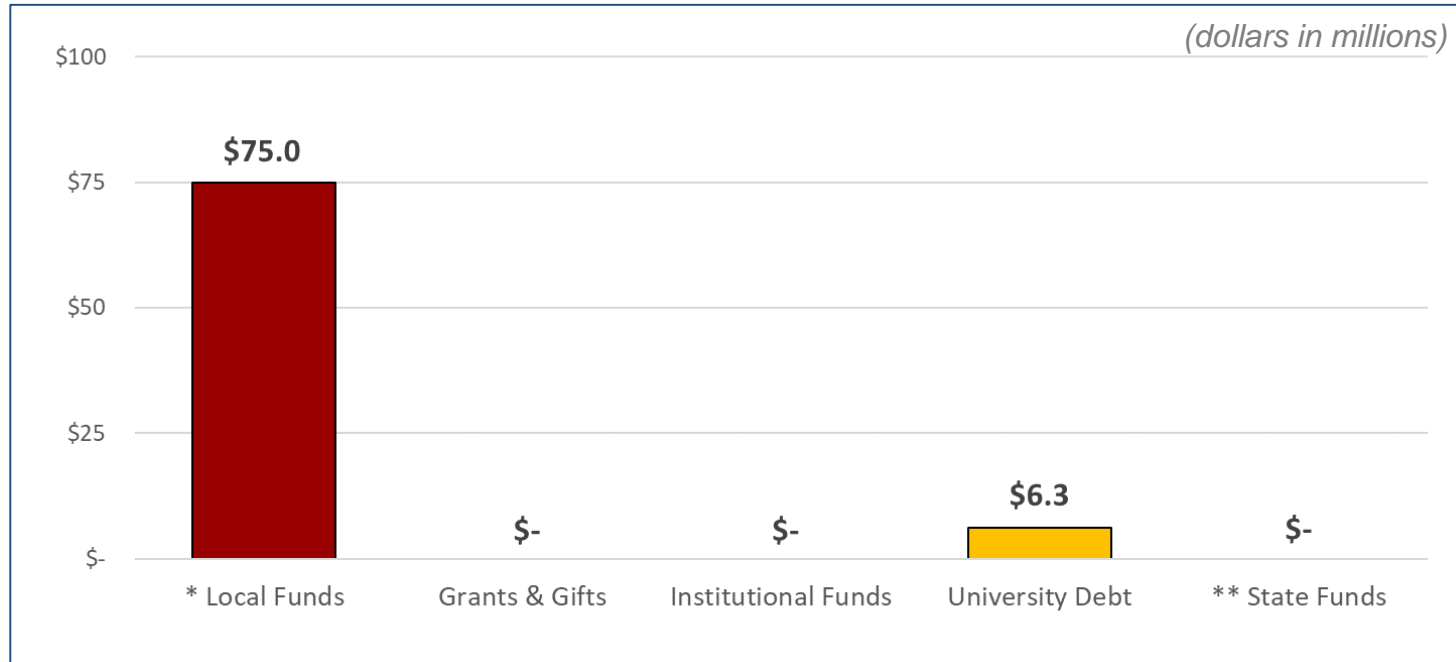
Location	Project	Facility
UMTC	Advanced Research and Diagnostics Lab (ARDL)	To Be Determined
UMTC	Coffman Union Dining Updates	Coffman Memorial Union
UMTC	Community-University Health Care Center (CUHCC)	New Facility
UMTC	Energy Efficiency Improvements	Campuswide
UMD	Labovitz School of Business Sales Center Renovation	Library Annex
UMTC	Microbial Cell Production Facility Tenant Improvements	Microbial Cell Production Facility
UMTC	St Paul Campus Center	New Facility
UMTC	Solar Energy Projects	Campuswide

**Potential Additions have not yet met the readiness threshold for inclusion in the capital budget but may be added in June or later by amendment.*



FY 2025 Capital Budget by Source

UofM Funds represent 100% of the \$81.3 million FY 2025 Capital Budget



* Local Funds: R&R only for FY 2025

** State Funds: \$500M HEAPR requested; MN legislative session concluded without passing a Bonding Bill





UNIVERSITY OF MINNESOTA

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Crookston Duluth Morris Rochester Twin Cities

The University of Minnesota is an equal opportunity educator and employer.



BOARD OF REGENTS DOCKET ITEM SUMMARY

Finance & Operations

June 13, 2024

AGENDA ITEM: Interim President’s Recommended FY 2025 Annual Operating Budget

Review

Review + Action

Action

Discussion

This is a report required by Board policy.

PRESENTERS: Interim President Jeffrey Ettinger
Julie Tonneson, Interim Senior Vice President and Budget Director
Koryn Zewers, Assistant Budget Director

PURPOSE & KEY POINTS

The purpose of this item is to act on the Interim President’s Recommended FY 2025 Annual Operating Budget.

The proposed operating budget is consistent with the draft that was reviewed by the Finance & Operations Committee on May 9, 2024 with four updates:

- \$1.4 million nonrecurring increase in undergraduate student aid to fund approximately half of the estimated reduction in awards to some students provided through the Minnesota State Grant Program. This is a one-time increase in University funding and is specifically for undergraduate students from families with income in the \$80,000-\$120,000 range (those just above the eligibility cut-off for the North Star Promise Program). The University anticipates that the State of Minnesota will adjust funding for the Minnesota State Grant Program or change formulas within the program beginning in FY 2026 to arrive at new award levels for students. Attachment 1 has been updated to include this nonrecurring investment.
- Three technical corrections that have no substantive impact on the recommended budget:
 1. The recommended implementation of the Duluth campus Midwest Nonresident rate in FY2025 includes undergraduate students with residency in South Dakota due to the recent change made by the state of South Dakota to end reciprocity. While the recommended budget presented in May included this change, Attachment 4 has been updated to specifically list the states of residency that are part of UMD’s Midwest Nonresident rate program: those approved last year (Illinois, Indiana, Iowa, Kansas, Michigan, Missouri, Nebraska, and Ohio), and now the recommended inclusion of South Dakota.
 2. The Post-Baccalaureate Certificate in French Studies special tuition rate in the College of Liberal Arts, Twin Cities campus has been removed from Attachment 4 because the program has been discontinued.

3. Technical corrections incorporating internal transfers into the distribution of unit allocations have been made to the Fund Forecast: Attachment 10.

For accuracy and completion, these four changes have been incorporated into the relevant attachments for approval (attachments 1, 2, 4, and 10).

Also included in the docket are public comments collected via the Virtual Forum.

The recommended operating budget includes an overview of specific financial issues, including information on academic and operating investments, compensation plans, unit, and institutional revenue adjustments, proposed internal reallocations, tuition rates, and related fees. A complete description of the proposed resource and expenditure plans across all funds (including an executive summary and detailed rate and fee tables) is provided in the “Interim President’s Fiscal Year 2025 Annual Operating Budget,” which is included in the docket.

The all-current-funds budget plan for FY 2025, which includes state appropriations, tuition, and all other sources (such as gifts, indirect cost recovery, sales and fees, sponsored grants, etc.), is balanced with proposed total revenues (including internal sales) of \$5,084,000,000 and expenditures/transfers of \$5,015,000,000.

Overall, the University is in a stable financial position. The top two priorities for this year are 1) attracting and retaining talented faculty and staff necessary to achieve the University’s strategic goals and 2) addressing inflationary pressures and other financial challenges varying by unit. In addition, the recommended budget recognizes the need to respond to compliance requirements and to invest in targeted areas in a limited way due to constrained resources. Incremental revenue growth for FY 2025 relies on proposed increases in tuition rates at levels slightly higher than planned in the original biennial budget request due to a flat state appropriation for the year. Further growth in other revenues, such as Indirect Cost Recovery reimbursements on federal grants or sales activity, are also key to balancing the FY 2025 budget in the absence of additional funding from the state. Still, even with the growth in generated revenues and the projected growth in tuition revenues, the budget plan is only possible with continued significant reprioritization and internal reallocation of existing resources.

To highlight the proposed incremental changes for balancing the primary discretionary funds of the University (state and tuition revenues), the FY 2025 Budget Framework recommended by the Interim President is as follows:

University of Minnesota
FY 2025 Recurring Budget Framework

Incremental Resources:	Proposed
Appropriation for Core Mission	\$0
O&M Set Aside in FY24 for the FY25 Budget	\$9,000,000
Unit Reallocations	\$17,500,000
Central Reallocations	\$4,500,000
Unit Other Revenue Increases	\$20,000,000
Tuition Revenue	\$42,200,000
One-Time Central Balances to Bridge	<u>\$6,000,000</u>
Total Incremental Resources	\$99,200,000

Incremental Investments:

Compensation and Benefits	\$35,900,000
Core Operations and Services	\$19,300,000
Program Enhancements/Student Aid	\$18,100,000
FY 2024 Tuition Challenges	\$16,400,000
Facilities and Technology Infrastructure	<u>\$9,100,000</u>
Total Incremental Investments	\$98,800,000
Balance	\$400,000

The resource and investment plans outlined above are included within the recommended \$5.0 billion all-funds budget for FY 2025.

The budget supports MPact 2025 Systemwide Strategic Plan goals, advances the University's excellence in the face of rising costs and limited revenue growth, and successfully addresses key priorities shared by the Board and the Interim President. The budget reflects these goals by maintaining and enhancing key services and programs to better serve students and to build strong relationships with the University's constituency across the state, incorporating a responsible tuition and fee plan, and challenging all units within the University to continuously prioritize and improve efficiency to move resources to areas of higher strategic impact or need.

BACKGROUND INFORMATION

The committee previously discussed information specifically related to the FY 2025 Operating Budget at the following meetings:

- May 2024: *Interim President's Recommended FY 2025 Annual Operating Budget*, Finance & Operations
- February 2024: *FY 2025 Annual Operating Budget Framework*, Finance & Operations
- December 2023: *FY 2025 Budget Variables and Levers*, Finance & Operations
- September 2023: *Overview of University Budget Model*, Finance & Operations

INTERIM PRESIDENT'S RECOMMENDATION

The Interim President recommends approval of the resolution related to the FY 2025 Annual Operating Budget.



REGENTS OF THE UNIVERSITY OF MINNESOTA

RESOLUTION RELATED TO

The Fiscal Year 2025 Annual Operating Budget

WHEREAS, the University of Minnesota (University), as the state's public, land grant university, is charged with the responsibility to pursue knowledge and help apply that knowledge through research and discovery, teaching and learning, and outreach and public service; and

WHEREAS, the State of Minnesota, through its legislative and executive branches, has appropriated \$746,732,000 in recurring and nonrecurring state general fund monies for fiscal year 2025 (FY25) to the University, which is a decrease of \$10,264,000 compared to fiscal year 2024 (FY24), for the pursuit of its mission and in support of our goals and objectives; and

WHEREAS, continued market pressures on wages for many faculty and staff groups continue to drive significant budget decisions in FY 2025 and continue into the next biennium; and

WHEREAS, expenditures for FY 2025 will be impacted differentially across the University by the continued high inflation rates for a variety of goods and services coupled with increasing compliance-related requirements; and

WHEREAS, the state's new North Star Promise program will be implemented for the first time in the 2024-25 academic year, ensuring student aid to cover full tuition and fees to eligible undergraduate students (MN residents from families with incomes up to \$80,000); and

WHEREAS, the future of the University is premised on partnerships within the University community of faculty, staff, and students with the State of Minnesota, other educational institutions, businesses and industry, University alumni, local communities, and the residents of Minnesota; and

WHEREAS, the University is committed to achieving standards of national and international excellence while maintaining efficient and effective services and processes.

NOW, THEREFORE, BE IT RESOLVED that the Board of Regents approves the University of Minnesota FY 2025 Annual Operating Budget, including the following attachments:

- | | |
|--------------|-------------------------------------------------------------------------|
| Attachment 1 | Recommended Incremental Investments - Revised |
| Attachment 2 | Resource and Expenditure Budget Plan (University Fiscal Page) - Revised |
| Attachment 4 | University of Minnesota 2024-25: Tuition Rate Plan - Revised |
| Attachment 6 | University of Minnesota 2024-25: Course & Class Fees |
| Attachment 7 | University of Minnesota 2024-25: Miscellaneous Fees |
| Attachment 8 | University of Minnesota 2024-25: Academic Fees |

Attachment 9 University of Minnesota 2024-25 Student Services Fees
Attachment 10 Fund Forecast -Centrally Distributed and Attributed Funds - Revised

University of Minnesota

President's Recommended Fiscal Year 2025 Annual Operating Budget

For Action by the Board of Regents
June 13, 2024

President's Recommended FY 2025 Annual Operating Budget

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I. Executive Summary

FY 2025 Budget in Brief:

- Projected revenues and expenditures (all funds) reaching \$5 billion
- Sponsored grant spending projected to reach \$830 million
- Tuition rate increases driven by state appropriation levels for the second year of the biennium and continued inflation above 3%
- Increased reliance on projected 3-4% growth in non-state and non-tuition revenues
- Continued internal reallocation expectations for campuses, colleges, and support units averaging 0.8%
- Compensation increases (3% merit pool and 4% approved labor contracts) drive increased spending
- Investments in key priorities (meeting the instructional and service needs of students, research infrastructure, data security, marketing, and government relations to support enrollment and funding needs) and critical operating needs (compliance, facility operations, technology licenses, tuition shortfalls)
- Central Reserves accessed to address critical one-time needs and investments (campus-based enrollment marketing, initiative fund for the incoming president, auxiliary shortfalls)

This document outlines all estimates and recommended actions for implementing the University's FY 2025 annual operating budget. The State of Minnesota operates on a biennial cycle (the two-year structure under which the state appropriates funding to the University), and FY 2025 is the second year of the biennium that started on July 1, 2023. The appropriation for FY 2025 is incorporated into this budget. For all other revenues and total expenditures, this budget contains updated estimates and recommendations for FY 2025.

In summary, the Interim President's recommended all-funds budget is as follows:

Proposed FY 2025 Budget Summary: (\$ rounded to the nearest million)

Revenues	\$5,084,000,000
Expenditures/Transfers Out	\$5,013,000,000
Annual Operating Balance	\$71,000,000
Carryforward from FY 2024	\$1,640,000,000
Projected Ending Balance FY 2024	\$1,711,000,000

The total estimated revenue of \$5.1 billion is an increase of 3.4% compared to FY 2024. The total estimated expenditures/transfers out of \$5.0 billion is an increase of 3.3%. The gain in the operating balance of \$71.0 million (1.4% of expenditures and transfers out) results from conservative budget estimates based on an analysis of the trends in revenues and expenditures and decisions for FY 2025 incorporated into the recommendations. It is critical for the University to maintain an annual operating balance in each fiscal year as it is a leading indicator of financial health at the institutional level and helps to mitigate fluctuations in recurring revenues.

Factors Impacting Revenue and Expenditure Estimates:

The primary factors impacting revenue estimates for FY 2025 are the following:

- A \$0 change in recurring state appropriations/support.
- Recommended tuition rate increases varying across campuses and student groups:
 - Twin Cities undergraduate and graduate, resident = 4.5% and nonresident = 5.5%;
 - University of MN Rochester (UMR) undergraduate and graduate, resident, and non-resident = 4.5%;
 - University of MN Crookston (UMC), University of MN Duluth (UMD), and University of MN Morris (UMM) undergraduate resident, and non-resident = 1.5%;
 - departmental masters, certificate, and professional rates = generally 0% to 5.5% based on demand, tuition structures, and market considerations (with some outliers due to restructuring or unique circumstances).
- A tuition-to-budget positive variance in FY 2024 of \$9.5 million for 11 (of 25) tuition-generating units; a recurring growth in revenue that is uncommitted and therefore available to address cost increases for FY 2025.
- An expected increase of \$40 million (5.1%) in sponsored research revenues compared to FY 2024 due to recent award success and units' estimates building on that success.
- General increases in the range of 3.0% to 4.0% applied to miscellaneous revenues (sales, gifts, endowment earnings, fees, clinical income, etc.) to reflect expected growth in activity and/or rates.
- Room and board rate increases ranging from 2.8-8.9% (varying by campus) to cover projected cost increases primarily driven by labor costs and inflation on food.

The primary factors impacting expenditure estimates are the following:

- Continued investment in University employees through the implementation of a 3% general merit pool increase (all funds total cost, including sponsored funds and with fringe, estimated at roughly \$71.2 million: \$35.9 million in state and tuition funds and \$35.3 million in all other funds). This is combined with the implementation of a \$20/hour minimum pay level for all civil service and professional academic/administrative employees and an increase in the minimum hourly wage for student employees from \$15.00 to \$15.25. Market adjustments on top of merit increases will be managed by the budgeting units depending on their unique needs and available resources. The projected total increase for salaries and fringe across all funds and for all purposes is roughly \$105 million.
- General increases averaging 3.5% for other operating costs (equipment, supplies, travel, professional services, technology licensing & maintenance, etc.) to reflect the impact of differential inflation offset some by planned reallocations and historical patterns of reduced buying when costs increase.
- An increase in overall facility-related costs compared to FY 2024 (roughly \$6.7 million) driven by increased utility and debt costs.
- The requirement to address a roughly \$16 million shortfall in tuition revenue compared to budget in FY 2024 for 14 (of 25) tuition-generating units; a shortfall that must be addressed through replacement revenue growth or reduced costs - before factoring in increased costs in those units for FY 2025.
- The requirement to address roughly \$12 million in structural imbalances carried forward from FY 2023 and contractual cost increases for the next fiscal year unique to individual budgeting units.
- An additional recurring investment in core operations and services to maintain excellence and address immediate needs (summarized in section IV-B and itemized in Attachment 1).

Additional Budget Factors Embedded within the Estimates Described Above

Redeploying Existing Resources: To fund a portion of the cost increases described above, the recommended budget includes expected internal reallocations (not increased revenue to the institution but spending reductions to redeploy existing resources) in state and tuition-funded activities of \$17.5 million. On average, this represents a 0.9% reduction in state and tuition funds across all academic units (ranging from 0.0% to 3.7%) and a 0.7% reduction across all support units (ranging from 0.4% to 1.1%). More significant reductions in academic units are expected where recent enrollment declines have led to a substantial decrease in tuition revenue.

Existing Operations & Maintenance (O&M) Funds: The FY 2024 approved budget included two allocations of O&M funds to be held centrally for future recurring allocation out to the units. The first of these was a \$4.5 million recurring allocation approved in FY 2022 as a revolving fund for annual nonrecurring investments in MPact 2025 initiatives, and the second was a set aside of \$9.0 million from the increased FY 2024 state O&M appropriation to address cost increases beginning in FY 2025. This \$13.4 million is not increased revenue to the institution: it represents existing FY 2024 resources made available to allocate on a recurring basis to the budgeting units for FY 2025. It will help cover cost increases next fiscal year, alongside increases in tuition and reliance on growth in other revenue sources.

One-Time Bridging Funds: The recommended FY 2025 budget includes two significant situations in which nonrecurring balances will be used to delay the required unit-level spending reductions that would otherwise be necessary to cover costs in FY 2025. \$8.8 million of recurring expenditures in FY 2025 will be covered with one-time balances:

- \$2.8 million of UMD and UMM balances due to enrollment challenges in FY 2024 and the expected challenges in FY 2025. This amount is being reserved to help bridge the gap until planned revenue growth or expense reductions in FY 2026.
- \$6.0 million from central reserves for projected operating budget shortfalls at UMD and the Carlson School of Management, primarily driven by the cumulative structural imbalances entering FY 2024, enrollment levels below budget in FY 2024, and projected further enrollment challenges for FY 2025. (Note: the Carlson School of Management enrollment challenges are related to graduate, rather than undergraduate programs.) The UMD campus will be implementing programmatic changes to realize savings in instructional delivery costs starting in FY 2026, and the Carlson School of Management is implementing changes designed to increase future tuition revenues.

One-Time Use of Central Reserves Funds Beyond Bridging: The FY 2025 budget incorporates a relatively limited number of recurring investments to enhance programs or services. However, due to recent investment gains in the Temporary Investment Pool (TIP), the balance of Central Reserves is expected to exceed the Board policy guideline equal to 4% of the state appropriation by more than \$100 million – a nonrecurring balance that can be utilized for nonrecurring expenses. As a result, this recommended budget includes a fund management plan as well as the proposed one-time allocation of \$38 million to accomplish four things:

- 1) advance strategic initiatives;
- 2) address lingering accumulated deficits in student housing and dining driven largely by the pandemic, high inflation, lower occupancy rates, and the desire to hold down the cost of attendance;
- 3) fund accumulated deficits related to legal settlements and closed cases; and
- 4) bridge support for UMD and the Carlson School of Management, as mentioned above.

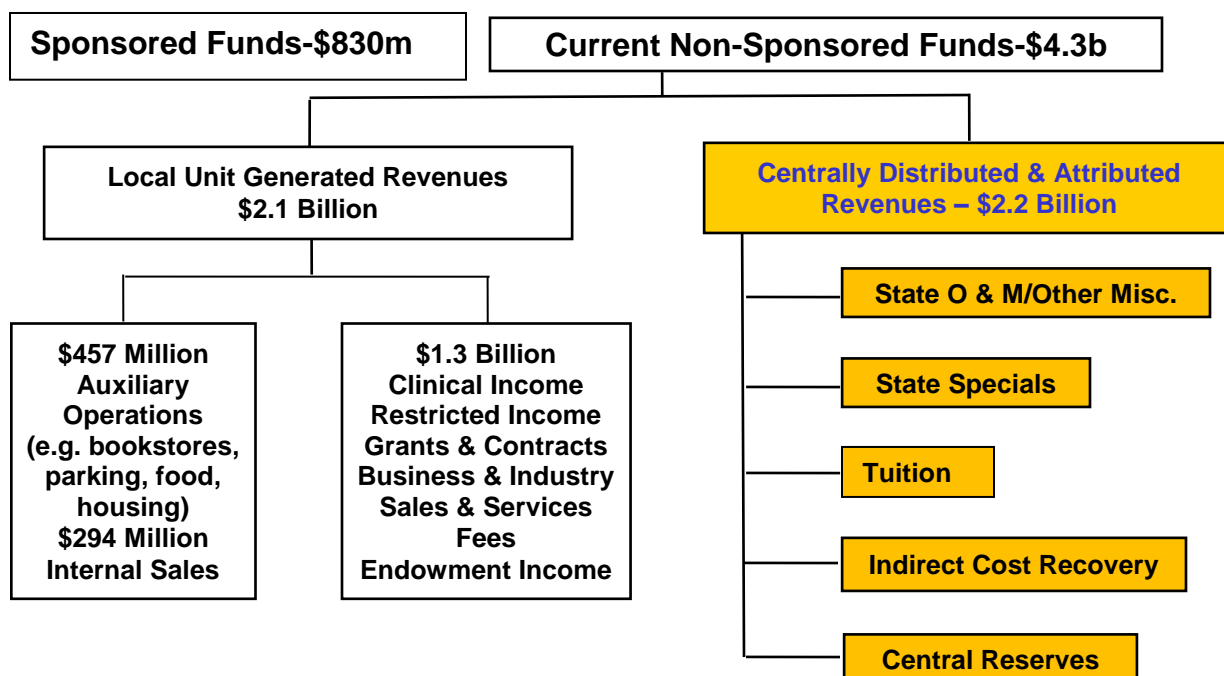
A list of funded items is included in Attachment 1. The impact of this recommendation on central reserves, along with an overall central reserve fund management and spending plan, is described in section V-B-1.

The remaining pages of the Interim President's Recommended Operating Budget for FY 2025 detail each of the points included in this summary. Overall, the University is facing tuition revenue challenges in some units and significant cost increases related to compensation decisions and general inflation. These expenses and revenue challenges require recurring solutions. The recommended budget addresses those challenges consistent with the original biennial budget proposal to the state but without any incremental growth in the state appropriation for the second year of the biennium: tuition rate changes larger than originally planned and proposed, internal reallocation of existing resources (budget cuts), and increased reliance on growth in other revenues. Purposefully focusing on attracting and retaining talented faculty and staff necessary to deliver on the University's mission remains the top priority for the year. Any additional discretionary resources will be directed to support student services and initiatives aligned with the goals of MPact 2025.

While it is challenging to build a budget that achieves strategic goals and advances the University's excellence in the face of rising costs, flat state support, and limited revenue growth, this budget successfully addresses key priorities shared by the President and the Board of Regents. It does so by investing in building and maintaining excellence, incorporating a responsible tuition and fee plan, and challenging all units within the University to continuously prioritize and improve efficiency to move resources to areas of highest strategic impact or need.

II. All-Funds Budget – Summary

The FY 2025 Annual Operating Budget presented here for approval is an “all-funds” budget. Attachment 2, “University Fiscal Page,” provides the detailed budget for FY 2025 in an all-funds context (sponsored fund totals presented rather than by detailed object spending level as those funds are budgeted on a multi-year rather than annual basis). The chart below displays the fund structure included in this budget.



Sponsored funds are those provided to the University by a grant or a contract under Board policy and administered through Sponsored Project Administration (SPA) and Sponsored Financial Reporting (SFR) units. These are restricted funds budgeted on a multi-year, project-by-project basis, subject to special grant rules and reporting procedures. For FY 2025, the total projected sponsored funds budget (without indirect costs) is \$830.0 million, representing an estimate of total expenditures to be reimbursed by sponsors during the year. It is included here to identify the University's total annual operating budget, but it does not require Board approval for particular projects. Projections of sponsored activity in the future are strong. The \$830 million projected spending in FY 2025 represents a 5.1% increase from FY 2024, which represents a continuation of the growth trend coming out of the pandemic-driven spike in awards.

Funds in the Local Unit Generated Revenues category are monitored and reviewed by central administration but are automatically attributed to the units as generated and are managed within those units. The annual budgeting of revenues and expenses in this category of funds requires estimating and decision-making processes at the local unit level but not by central administration (some auxiliary rates, such as those for student room and board and parking, are reviewed and approved by central administration for inclusion in this recommended operating budget, however).

Although this is an all-funds budget, including estimated revenues and expenditures across all funds, the primary focus of this document is an explanation of the budget and the corresponding details related to the category of funds commonly referred to as "centrally distributed and attributed," or funds requiring a decision process or formal approval by central administration and the Board of Regents on the exact amount to estimate and budget in each academic and support unit. These are the primary discretionary funds of the institution that support nearly the entire maintenance and operations of the University's core mission.

FY 2025 Annual Operating Budget Overview: The Numbers

In summary, the budget for total current non-sponsored funds is proposed as follows:

**Current Non-sponsored Funds – FY 2025 Operating Budget
(Including internal sales activity)**

Beginning Balance	\$1,640,051,972
Revenues	<u>\$4,253,712,346</u>
Total Resources	\$5,893,764,318
Expenditures & Net Transfers	<u>\$4,183,122,728</u>
Ending Balance	\$1,710,641,590

Sponsored Funds – FY 2025 Budget

Projected “Direct” Revenues/Spending	\$830,000,000
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Within the FY 2025 Recommended Annual Operating Budget, the primary funds supporting teaching, research, and outreach are Operations and Maintenance (O&M), Tuition, State Specials, Indirect Cost Recovery (ICR), and Central Reserves or those described above as centrally distributed and attributed. These five funds total approximately 46% of the projected \$4.8 billion in externally generated revenues for the University (excluding internal sales) and represent the primary focus of budget development and planning to support the University’s core infrastructure and academic mission. The remaining 54% of the University’s budget is derived from more restricted funds, including sponsored grants and contracts (17%), fees, auxiliary enterprises, philanthropic support, education sales, and services, etc. (37% combined).

FY 2025 Revenue and Expenditure Plan – Centrally Distributed/Attributed Funds

		<u>Percent</u>
<i>Beginning Balance</i>	\$95,267,936	
<i>Annual Revenues</i>		
Operations & Maintenance-State	\$676,294,000	31%
Operations & Maintenance-Other*	32,832,000	2%
Tuition (after waivers)	1,026,526,660	48%
State Specials	94,845,000	4%
Indirect Cost Recovery	236,990,918	11%
Central Reserves	<u>84,870,000</u>	4%
<i>Total Annual Revenues</i>	\$2,152,358,578	100%
Total Net Resources	\$2,247,626,514	
Allocations to Units*	<u>\$2,128,226,635</u>	
Ending Balance	\$119,399,879 (\$118.5M in central reserves)	

**Includes the internal Enterprise Assessment that runs through O&M but represents a redistribution of resources.*

III. FY 2025 Budget Development – Context and Summary Framework

A. FY 2024 and FY 2025 State Appropriations

Table 1 (below) outlines the University’s financial planning parameters related to state general fund O&M appropriations for the 2024-2025 biennial budget, as included in appropriation law within the Higher Education bill passed by the legislature. The appropriations from the Health Care Access Fund and the appropriation to the Academic Health Center pursuant to Minnesota Statutes,

section 297.10 (stable at \$2.2 million and \$22.3 million, respectively), and the recurring general fund state specials (\$68.4 million) have been excluded from the table. The nonrecurring general fund appropriations for various items, itemized below, have also been excluded from the table as they will automatically be removed from the appropriation after this biennium.

Table 1
University of Minnesota
2024 – 2025 Biennial Appropriations (\$ in Thousands)

	<u>FY2024</u>	<u>FY2025</u>	<u>Biennium</u>
Beginning Biennial Base Level	\$620,818	\$620,818	\$1,241,636
Appropriated State Funding Level	<u>\$672,294</u>	<u>\$672,294</u>	<u>\$1,344,588</u>
Change from Beginning Biennial Base Level	\$51,476	\$51,476	\$102,952
Change from Prior Year	\$51,476	\$0	
% Change from Prior Year	8.3%	0.0%	
% Increase from Biennial Base Level Funding			8.3%

Appropriation increases in the table above are to the Operations and Maintenance (O&M) appropriation only. There is no incremental increase in the appropriation for FY 2025. Additionally, there are no inflationary or other recurring increases to the general fund's State Special appropriations in either year, which now total \$70,438,000. With two exceptions (NRRRI in FY 2018 and Health Sciences Research in FY 2012), there have been no recurring increases to the long-standing state special appropriations existing at the start of this century, and in fact, these have all decreased from funding levels twenty years ago.

The \$102,952,000 increase for the biennium represents a two-year increase for 2024 and 2025 combined, over the two-year base for the previous biennium. It does not represent an increase in the University's annual recurring appropriation. That increase is \$51,476,000: the annual recurring base appropriation for FY25 (the second and last year in the biennium) is \$51,476,000 more than the recurring appropriation for FY 2023. As a result, it is appropriate to think of the increased appropriation as providing resources for \$51,476,000 in cost growth and/or new investment over the two fiscal years (FY24 and FY25). The original biennial request for operations was an incremental increase of \$45,000,000 each year – which would have resulted in a recurring base increase of \$90,000,000 by the end of the biennium. In the final result, the University received 57% of the requested recurring increase.

The \$51,476,000 recurring increase was provided for four purposes:

1. \$50,000,000 for core mission support
2. \$1,000,000 for safety and security improvements on all campuses
3. \$366,000 for unemployment insurance aid
4. \$110,000 for ensuring access to menstrual products in facilities on all campuses

All but \$8.9 million of the increase was allocated recurring to intended purposes in the FY 2024 approved budget. For FY 2025, there is no incremental increase in state funding. The \$8.9 million was allocated to non-recurring items in the FY 2024 budget and is now available for allocation to cover recurring costs in FY 2025.

Nonrecurring Appropriations: In addition to the above, the University received the following new appropriations by year (these amounts will not continue into the next biennium):

	<u>FY 2024</u>	<u>FY 2025</u>
Safety and Security	\$4,000,000	\$4,000,000
Natural Resources Research Institute	\$2,000,000	\$2,000,000
Access to Menstrual Products	\$264,000	\$0
CentraCare	\$10,000,000	\$0

For Transfer to the University: The University's request to the state for the 2024-25 biennium included \$4.5 million annually for the American Indian Scholars Program. While this item was not included in the appropriations to the University and is therefore not included in the table above, the state did appropriate \$8.5 million for this program to the Office of Higher Education, of which \$4,032,000 is directed to be transferred annually to the University of Minnesota. The \$4.0 million became available starting in FY 2024 to fund this new first-dollar "free tuition and fees" scholarship program for eligible students at each of the University's five campuses and offsets tuition and fee revenue for this subset of students. At the Morris campus, the funds can be used to take the place of currently offered waivers for eligible students.

Attachment 3 - Supplemental Information: Changes in the State Appropriations contains a summary of the University's full biennial budget request compared to the actual appropriation changes received by fiscal year, as well as a summary of financial support provided to University activities for the next biennium outside of the Higher Education bill.

While the University submitted a supplemental request to the State of Minnesota for consideration in the 2024 legislative session, any potential approval of that request is not factored into the Interim President's Recommended Operating Budget for FY 2025. In addition to capital budget items, the request included recurring operating funds for the University as a whole and for Academic Health priorities. The recommended FY 2025 budget is not dependent on increased funding related to any of these requested items: based on current conversations and targets provided to the Higher Education committees of the legislature, it is highly unlikely that any additional recurring funds will be appropriated to the University for FY 2025. If any increases are approved prior to the June Board of Regents meeting, the budget as presented for approval will include any necessary modifications.

B. FY 2025 Budget Framework – Incremental Changes from the Prior Year

Each biennium, the University develops a budget planning framework to project the major cost drivers and potential revenue adjustments within the primary discretionary funds in the operating budget: the state appropriation and tuition. The goal of the *annual* budget process (as a correlated component of the biennial budget plan) is to balance institutional resources and spending decisions in these framework funds and to put in place plans for setting unit spending levels consistent with projected revenues for all the other sources of funding. This document outlines specific decisions and the resulting proposed budget for state appropriations and tuition (combined) and identifies the projected revenues and spending in all other funds. The combination is presented as an all-funds budget in Attachment 2: Resource and Expenditure Budget Plan – University Fiscal Page.

As a subset of the all-funds proposed budget, Table 2 focuses on plans for the primary discretionary funds in the operating budget (O&M appropriation and tuition) and what it will take to balance

within those funds. It identifies the proposed **incremental** recurring changes in resources and expenditures compared to the prior fiscal year. Each year the recurring budget for these funds is balanced at the institutional level (recurring resources exceed recurring expenditures), so it is appropriate to confine budget planning at this level to incremental changes.

Table 2
University of Minnesota
FY 2025 **Recurring** Framework

Incremental Resources:	Proposed
Appropriation for Core Mission	\$0
O&M Set Aside in FY24 for the FY25 Budget	\$9,000,000
Unit Reallocations	\$17,500,000
Central Reallocations	\$4,500,000
Unit Other Revenue Increases	\$20,000,000
Tuition Revenue	\$42,200,000
One-Time Central Balances to Bridge	<u>\$6,000,000</u>
Total Incremental Resources	\$99,200,000
Incremental Investments:	
Compensation and Benefits	\$35,900,000
Core Operations and Services	\$19,300,000
Program Enhancements/Student Aid	\$18,100,000
FY 2024 Tuition Challenges	\$16,400,000
Facilities and Technology Infrastructure	<u>\$9,100,000</u>
Total Incremental Investments	\$98,800,000
Balance	\$400,000

IV. FY 2025 Budget – Framework Resource & Investment Plan Details

A. Summary – FY 2025 Incremental Resources

1. State Appropriation

The recurring state appropriation increase to the University for FY 2025 is \$0. Two nonrecurring appropriations from FY 2024 continue into FY 2025 before being eliminated in the next biennial base: \$4,000,000 for safety and security items system-wide, and \$2,000,000 for the Natural Resources Research Institute.

The law also included one additional provision relevant to implementation with the FY 2025 budget:

- Language creating a free tuition and fees program for eligible Minnesota students attending a public institution in the state – the North Star Promise Program. Eligibility is based on income (generally from families with annual income up to \$80,000), and awards cover remaining tuition and fees costs after all other federal, state, and institutional grants and gift aid have been applied. Based on recent enrollments, 8500-9000 University students could be eligible for these awards. The program will start with the 2024-2025 academic

year (FY 2025), so the University has been working with the state Office of Higher Education (the agency responsible for administering the program) to better understand the program's intent and implementation details. This program will not add revenue to the University directly: it provides funding to pay a portion of students' tuition bills. To the extent that it has a positive impact on the number of students choosing to attend a University campus, it could increase enrollment from what it otherwise would have been, thus increasing the corresponding tuition revenue. That amount, however, is impossible to know with certainty, so it is not a separately budgeted item. Any financial impact is incorporated into the overall tuition revenue estimates included within this recommended budget.

2. Tuition

The President's Recommended FY 2025 Annual Operating Budget incorporates an estimated increase in tuition revenues to the institution of \$42.2 million. This is primarily the result of the following factors:

- a) A recommendation to increase the resident undergraduate rate on the Twin Cities and Rochester campuses by 4.5%, and on the Crookston, Duluth, and Morris campuses by 1.5%.

Federal and state aid programs (summarized later in this section) are increasing for the next academic year for students with the most significant financial need and will provide an offset to the recommended tuition increases for students eligible for those grants, thereby helping to maintain the University's relatively low net price for those with the greatest financial need. As further explained later in this section, the state grants for students from families with incomes just above the North Star Promise Program threshold (roughly in the \$80,000 to \$120,000 range) will be decreasing for FY 2025 due to changes in the state program largely driven by a projected shortfall in available appropriations.

- b) A recommendation to increase the nonresident undergraduate rate on the Twin Cities campus by 5.5% and on the other campuses with nonresident rates (UMD and UMM) by 1.5%. The Twin Cities rate is currently 13th highest out of 18 in the Big10 (11th out of 16 publics) and given early information from informal discussions with other Big10 institutions, it is highly likely the Twin Cities ranking will remain at 13th.
- c) A recommendation to increase the resident graduate rate by 4.5% and the nonresident graduate rate by 5.5%, consistent with the undergraduate rate recommendations for the Twin Cities campus.
- d) A recommendation to increase the tuition surcharge in the Carlson School of Management (CSOM) and the College of Science and Engineering (CSE) plus its majors in the College of Liberal Arts on the Twin Cities campus from \$1300/semester to \$1360/semester to coincide with the recommended increase in the resident tuition rate (the standard practice of providing a scholarship offset for Pell-eligible students to continue).
- e) The continued phase-in of the previously approved \$250/semester tuition surcharge for the Swenson College of Science and Engineering on the Duluth campus (year 4 of a 4-year phase-in by entering class). The standard practice of providing a scholarship offset for Pell-eligible students will continue.

- f) A recommendation to apply the reciprocity rates to students from South Dakota entering fall 2024 for all schools and campuses and for the full length of their expected enrollment. The change made by the state of South Dakota to end reciprocity was finalized after the application and acceptance process for fall 2024 was in full swing, so this recommendation maintains the rates that were understood when the application process began.
- g) A recommendation to implement varying rate changes for some departmental masters and certificate programs as well as professional programs. These varied programs within the University are evaluated and presented separately, rather than falling under a standard increase level. This practice recognizes their unique set of circumstances around enrollment demand, instructional costs, pricing strategies, student debt loads, earnings potential of graduates, competitive ranking, and so on. As a result of the analysis related to the professional rates for FY 2025, the President is recommending various rate changes as outlined in Attachment 4. Some programs and certificates are proposed with a 0% increase (certificate programs in the College of Continuing and Professional Studies, MS in Management of Technology and in Data Science in the College of Science and Engineering, or the Physical Therapy program in the Medical School, for example). Others are proposed to increase by less than 4.5%/5.5% (Law at 4.0%, Medicine for the entering cohort at 4.0% for residents and 5.0% for non-residents, and the PharmD at 4.0% for residents and 4.6% for non-residents, for example). Only one primary rate is proposed at an increase greater than 4.5% for MN residents: the entering cohort for Dentistry is at 6.0%, with the rate changes for 2nd through 4th-year students varying from 0%-3.3%. Many of the percentage changes in Attachment 4 are close to the general 4.5%, 5.5%, or 1.5% plans but do not equal those changes exactly in order to implement a desired dollar per credit value (round numbers or ease in transactions).
- h) Finally, the tuition revenue estimate for FY 2025 is impacted by estimated changes in enrollment. Similar to last year, ten out of twenty-five tuition-generating units are factoring enrollment decreases into their estimated revenues due to trends in student behavior in recent years. Some projected decreases are in the entering cohort, and some are in total enrollment as smaller cohorts from recent years work towards graduation. Some also include changes in projections for summer enrollments and/or a continued impact of changes in the mix of students, from more students paying nonresident rates to more paying resident rates. In total, however, these reductions are more than offset by estimated revenue increases due to enrollment increases and/or changes in the student mix projected in eleven units.

Attachment 4 (U of M Tuition Rate Plan) provides details regarding all proposed tuition rates beyond those identified in the following table.

University of Minnesota 2024-25 Undergraduate and Graduate Tuition Plan – Primary Rate Categories

			\$ Inc		% Inc	
	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident
Twin Cities Undergraduate	\$15,148	\$36,296	\$652	\$1,886	4.5%	5.5%
Duluth Undergraduate	\$12,958	\$18,484	\$192	\$274	1.5%	1.5%
Morris Undergraduate	\$13,130	\$15,314	\$198	\$232	1.5%	1.5%
Crookston Undergraduate	\$11,648	\$11,648	\$170	\$170	1.5%	1.5%
Rochester Undergraduate	\$13,854	\$13,854	\$598	\$598	4.5%	4.5%
Graduate Programs	\$19,980	\$31,212	\$864	\$1,632	4.5%	5.5%
Dentistry (First year students, 12 mos.)	\$61,567	\$113,630	\$3,484	\$6,433	6.0%	6.0%
Law	\$48,528	\$58,344	\$1,872	\$2,256	4.0%	4.0%
Medical (First year students, 12 mos.)	\$44,556	\$67,470	\$1,695	\$3,213	4.0%	5.0%
Pharmacy	\$28,968	\$33,456	\$1,104	\$1,456	4.0%	4.6%
Veterinary Medicine (First year students)	\$33,516	\$62,298	\$1,440	\$2,682	4.5%	4.5%
MBA Day (First year students)	\$45,600	\$59,040	\$1,920	\$3,120	4.4%	5.6%
A complete list of all tuition rates can be found in Attachment 4.						

Federal, State, and University Need-Based Grant Programs

Federal Pell Grant program: The United States Department of Education administers the Pell Grant program for the neediest students across the U.S. The Department has announced that the maximum Pell Grant award will be stable at \$7,395 for the 2024-25 academic year. However, the 2024-25 Pell Grant will be based on the U.S. Department of Education’s new Pell Grant awarding formula, which uses 3 categories of awarding for eligible students: students qualifying for the maximum Pell Grant based on federal poverty guidelines, students qualifying for an amount equal to maximum Pell Grant minus the Student Aid Index amount, and students qualifying for a minimum Pell Grant.

Minnesota State Grant Program: The Minnesota Office of Higher Education administers the State Grant Program, which awards need-based aid to low and moderate-income students and families across the state. State grant awards are available to Minnesota residents generally up to \$100,000 in annual income but, in some circumstances, can support students from families making over \$120,000 annually (awards were based on “Expected Family Contribution” or EFC, now “Student Aid Index” or SAI amounts and not income). State grant annual award amounts can provide up to

\$15,000 in financial support for students, but the systemwide average award in 2022-2023 was \$5,763. Over 11,000 University of Minnesota students are assisted each year by this program.

The Minnesota Office of Higher Education has not yet issued updates on the final state grant parameters. Currently, the state projects an \$18.3M shortfall in State Grant funding for the 2024-2025 year. As a result, the state has changed award parameters to reduce State Grant awards for students to stay within available appropriations. Reductions are progressive and increase as the student's EFC/SAI increases. However, combined with changes to the FAFSA, the use of the Student Aid Index instead of EFC, changes to the Pell Grant awarding formula, and changes to the State Grant eligibility and award formula, the net impact to students is extremely complicated to estimate. Current estimates, which may change as new FAFSA data is received from the U.S. Department of Education, show significant increases in State Grant awards for students with incomes up to \$80,000. However, for students above \$80,000 AGI for the 2024-2025 academic year, State Grant awards are likely to decrease.

State of MN North Star Promise Program: The Minnesota Office of Higher Education will be awarding North Star Promise Scholarships to Minnesota resident students beginning with the 2024-2025 academic year. Eligibility is based on income (students with annual family-adjusted gross income up to \$80,000), and awards cover remaining tuition and fees costs after all other federal, state, and institutional gift aid have been applied. While the state has not issued final awarding parameters for the North Star Promise scholarships, estimated awards range from \$0-\$6,500, depending on income. At the University of MN, the majority of North Star Promise recipients are estimated to have a family income of \$50,000-\$80,000, given that Pell Grants, Minnesota State Grants, and U Promise cover 100% of tuition and fees at lower-income levels.

There is also a provision in state law for the North Star Promise Plus scholarships, which is additional state funding available to Pell Grant recipients. However, the Office of Higher Education has not yet released details on the eligibility for or amount of those additional awards.

This program will not add revenue to the University directly: it provides funding to pay a portion of students' tuition bills. To the extent that it has a positive impact on the number of students choosing to attend a University campus, it could increase enrollment from what it otherwise would have been, thus increasing the corresponding tuition revenue. That amount, however, is impossible to know with certainty so it is not a separately budgeted item. Any financial impact is incorporated into the overall tuition revenue estimates included within this recommended budget.

Net Combined Impact of Pell Grant + State Grant + North Star Promise: As they do every year, the Pell Grant and State Grant levels are anticipated to change in 2024-2025, with the North Star Promise Scholarships coming in for the first time as last-dollar awards. Though every student has different financial circumstances, the typical University of Minnesota student has income at or below \$80,000 and qualifying for Pell Grants, Minnesota State Grants, and/or North Star Promise Scholarships could see significant award increases in 2024-25 ranging from \$1,900 to \$8,700, depending on the campus and student's financial circumstances.

Lower income (\$0-\$19,000 AGI) Minnesota residents eligible for the State Grant on the Twin Cities campus will likely net an estimated increase of \$1,991 between Pell Grants, Minnesota State Grants, and/or North Star Promise Scholarships (this addition easily covers the proposed \$724 increase in resident tuition and required fees for the TC campus). The estimates are similar at the other system campuses, where the net Pell or State Grant increase is \$1,561 at UMC, \$1,566 at UMD and UMM,

and \$1,933 at UMR (greater than 100% of the proposed tuition increase for MN residents in each case).

Middle income (\$70,000-\$80,000 AGI) Minnesota residents eligible for the State Grant on the Twin Cities campus will likely net an estimated increase of \$8,730 between Pell Grants, Minnesota State Grants, and/or North Star Promise Scholarships (this addition easily covers the proposed \$724 increase in resident tuition and required fees for the TC campus). The estimates are similar at the other system campuses, where the net Pell Grant, State Grant, and North Star Promise increase is \$6,269 at UMC, \$6,760 at UMD, \$6,814 at UMM, and \$7,272 at UMR (greater than 100% of the proposed tuition increase for MN residents in each case).

However, Minnesota resident students with incomes above \$80,000 who are eligible for the State Grant Program will likely see decreases in their State Grant awards for two reasons. First, the state changed the award parameters due to a shortfall in the appropriations needed to fund the program's existing parameters (the Office of Higher Education has the authority to adjust parameters to fit available funding levels). The second is because of the regulatory change from the Expected Family Contribution (EFC) to the Student Aid Index (SAI). Their new SAIs are estimated to be slightly higher than their previous year's EFC (the 2023-24 EFC of \$15,000 has transformed into a 2024-25 SAI of \$15,700) effectively increasing family contributions. For example, a student on the Twin Cities campus with a family income of \$100,000 will likely see an estimated decline of -\$1,316 in their State Grant award, in addition to the proposed tuition and fee increase for MN residents. The estimates are similar at the other system campuses, where the net State Grant decrease is estimated to be -\$1,045 at UMC, -\$1,510 at UMD, -\$1,562 at UMM, and -\$1,285 at UMR. There is a fair amount of uncertainty in the final actions and impacts, but these estimates are based on information available at the time of this writing. The state grant program awards should adjust back up in the next biennium as the Office of Higher Education presents the program's total cost to the Governor and the legislature.

University Promise Scholarship Program: For FY 2025, the University's Promise Scholarship Program for Minnesota resident students will continue to help ensure the University remains affordable for students from low and middle-income families. The number of students eligible for the program is projected to be nearly 15,000 and will be supported with \$28+ million in Promise scholarships. This base funding level (no recommended increase in the allocation) will ensure the University's ongoing commitment to students for which award amounts are not changing and is sufficient to cover currently estimated costs plus some increases should the number of eligible students grow in FY 2025. Minnesota resident undergraduates on all campuses with adjusted gross incomes of \$120,000 or less are automatically eligible for Promise awards between \$300 and \$4,000 annually, based on family incomes and expected family contributions.

Promise Plus Free Tuition Program: The Promise Plus Free Tuition Program (Promise Plus) is an extension of the University Promise Scholarship Program to support Minnesota students in affording college. It provides funds in addition to the federal, state, and University grants or scholarships needed to cover tuition for new first-year students entering any system campus (starting with fall 2021) whose families make \$50,000 per year or less.

University Native American Promise Tuition Program: The Native American Promise Tuition program provides free tuition to any University of Minnesota campus for students who are citizens of the 11 Federally Recognized Tribal Nations in Minnesota (aside from UMM, which already has a waiver for these students) and whose families have annual earnings less than \$125,000. To be

eligible, students must be admitted as a new freshman or transfer student from one of the four tribal colleges in the state of Minnesota.

Beginning with the 2023-2024 academic year, individuals eligible for the Native American Promise Tuition program became newly eligible for the new American Indian Scholars Program (AISP) administered by the Office of Higher Education. AISP provides first-dollar scholarships for 100% of tuition and fees for students who are enrolled members or citizens of any federally recognized tribe or Canadian First Nation to attend the University of Minnesota.

In a commitment to honor the intent of the University's Native American Promise Tuition Program, the University has repurposed the existing U of M Native American Promise resources to create a number of housing scholarships for Native American students, thus helping these students get closer to covering full Cost of Attendance.

3. Change in Tuition, Fees, and Room & Board FY 2024 vs. FY 2025 – Resident Undergraduate Students

In addition to base tuition, students pursuing a university education incur additional fees and charges required to attend classes full-time. The information in this section depicts the experience of a "typical" or "average" resident undergraduate student living on campus, representing the most common experience.

- 1) The proposed rates for resident undergraduate tuition for the 2024-25 academic year will increase 4.5% over the 2023-24 academic year for the Twin Cities and Rochester campuses and 1.5% for the Crookston, Duluth, and Morris campuses. Across all campuses, annual tuition will vary as indicated in the tables below. Undergraduate tuition comprises 48.3%-52.1% of the total cost of tuition, required fees, and room and board based on the campus the student attends.
- 2) The student service fee and other required fees assessed to students represent between 4.1% - 6.8% of the total cost of tuition, fees, and room and board.

By campus, the total change for tuition and required fees, on a percentage basis are Crookston, 1.3%; Duluth, 2.0%; Morris, 1.6%; Rochester, 4.3%, and Twin Cities, 4.4%.

- 3) Room and board, based on proposed rates for on-campus residence halls ranges from \$10,456 to \$13,662 and represents 41.7%- 47.6% of the total cost of tuition, fees, and room and board.

All combined, for 2024-25 the total increase in tuition, fees, and room and board for resident undergraduate students ranges from \$453 to \$1,552 depending on the campus the student attends with total cost of tuition, fees, and room and board ranging from \$23,973 to \$30,820. The corresponding estimated increases in these costs from FY24 to FY25 by campus are Crookston, 1.9%; Duluth, 4.8%; Morris, 3.4%; Rochester, 4.7% and Twin Cities, 5.3% (see tables below).

The tables below present the estimated total cost of tuition, fees, and room and board for an undergraduate resident student living in a standard room in a residence hall for the 2024-25 academic year at each of the five University of Minnesota campuses. Note that the cost of textbooks (such as the proposed \$279/semester Course Works Complete Fee, which is an optional fee for undergraduate students across the University of Minnesota system), supplies, and personal

expenses are not included in these totals so as to only capture tuition, required fees, and room and board; the pieces approved by the Board of Regents as part of the annual budget.

University of Minnesota - Crookston, Resident - Residence Hall				
	FY 24 Academic Yr.	FY 25 Academic Yr.	\$ Increase	% Increase
Tuition (13-credit band)	\$11,478	\$11,648	\$170	1.5%
Student services fee	\$592	\$589	-\$3	-0.5%
Campus fee	\$1,050	\$1,050	\$0	0.0%
Subtotal - tuition and required fees	\$13,120	\$13,287	\$167	1.3%

Room & Board (double room, Block 185)*	\$10,400	\$10,686	\$286	2.8%
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Total - Crookston	\$23,520	\$23,973	\$453	1.9%
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**The block 185 plan translates to approximately 12 meals/week and \$350 in flex dollars. UMC does not offer an unlimited meal plan. This room and board rate also includes a social fee that is charged to students living on campus.*

University of Minnesota - Duluth, Resident - Residence Hall				
	FY 24 Academic Yr.	FY 25 Academic Yr.	\$ Increase	% Increase
Tuition (13-credit band)	\$12,766	\$12,958	\$192	1.5%
Student services fee*	\$700	\$771	\$71	10.1%
Collegiate/Campus fee**	\$606	\$625	\$19	3.1%
Other required fees***	\$246	\$252	\$6	2.4%
Subtotal - tuition and required fees	\$14,318	\$14,606	\$288	2.0%

Room & Board (double room, unlimited meal plan)	\$9,602	\$10,456	\$854	8.9%
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Total - Duluth	\$23,920	\$25,062	\$1,142	4.8%
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**Student Services Fee & Capital Improvement Fee. The Capital Improvement Fee is increasing \$14.95/semester to begin generating a portion of the revenue for a new UMD Health Services Facility.*

***Average of all undergraduate programs, 6+ credits - based on fall 2023 enrollment*

****Transportation Fee & Duluth Athletics/Athletic Facilities Fee*

**** The tuition surcharge for Swenson College of Science and Engineering students is excluded from the above calculations since the surcharge only applies to students in a specific college.*

University of Minnesota - Morris, Resident - Residence Hall				
	FY 24 Academic Yr.	FY 25 Academic Yr.	\$ Increase	% Increase
Tuition (13-credit band)	\$12,932	\$13,126	\$194	1.5%
Student services fee	\$1,031	\$1,066	\$35	3.4%
Campus fee	\$324	\$330	\$6	1.9%
Subtotal - tuition and required fees	\$14,287	\$14,522	\$235	1.6%
Room & Board (double room, unlimited meal plan)	\$10,074	\$10,678	\$604	6.0%
Total - Morris	\$24,361	\$25,200	\$839	3.4%

University of Minnesota - Rochester, Resident - Residence Hall				
	FY 24 Academic Yr.	FY 25 Academic Yr.	\$ Increase	% Increase
Tuition (13-credit band)	\$13,256	\$13,854	\$598	4.5%
Student services fee	\$754	\$754	\$0	0.0%
Campus fee	\$390	\$408	\$18	4.6%
Subtotal - Tuition and Required fees	\$14,400	\$15,016	\$616	4.3%
Room & Board (SLC, unlimited meal plan)	\$12,990	\$13,662	\$672	5.2%
Total - Rochester	\$27,390	\$28,678	\$1,288	4.7%

University of Minnesota - Twin Cities, Resident - Residence Hall				
	FY 24 Academic Yr.	FY 25 Academic Yr.	\$ Increase	% Increase
Tuition (13-credit band)	\$14,496	\$15,148	\$652	4.5%
Student services fee	\$1,016	\$1,047	\$31	3.1%
Collegiate fee*	\$665	\$703	\$38	5.7%
Other required fees**	\$313	\$316	\$3	1.0%
Subtotal - tuition and required fees	\$16,490	\$17,214	\$724	4.4%
Room and board (double room, unlimited meal plan)	\$12,778	\$13,606	\$828	6.5%
Total - Twin Cities	\$29,268	\$30,820	\$1,552	5.3%
*Average of all undergraduate programs, 6+ credits – based on fall 2023 enrollment				
**MN Student Association, Capital Enhancement Fee, Stadium Fee, Transportation/Safety Fee				
*** Tuition surcharges are excluded from the above calculations since they only apply to students in specific colleges.				

4. Unit Level Resources

While the University-level budget framework is a planning tool to project the significant cost drivers and potential revenue adjustments within the primary discretionary funds in the operating budget (the state appropriation and tuition combined - referred to internally as O&M), at different points in the budget process, revenue and cost estimates in the other non-sponsored funds intersect with the framework. This is evident in the “Unit Level Resources” category of the annual resource plan. In total, \$37.5 million of incremental unit-level resources – over and above FY 2025 increases in state appropriations and tuition (O&M) - are contributing to balancing the costs projected for O&M. Four different types of unit-level resources make up that \$37.5 million total:

- 1) increases in revenue sources outside of the appropriation and tuition budget framework (primarily indirect cost recovery and other unrestricted funding sources such as sales income) are growing and are planned to cover costs previously supported by O&M - \$7.7 million,
- 2) nonrecurring balances from revenues that remain unspent in one year and carry forward into the next, often as a result of delays between one employee leaving and the replacement hire, or funds reserved for an item that is subsequently decided against - \$2.8 million (note – use of nonrecurring resources for recurring expense is only allowed in rare cases where the balances are significant enough to plan on their use over a period of years or where there is an identified permanent/recurring revenue source available at a known time in the future),
- 3) tuition revenue above budget in the current year for 11 units, that remained uncommitted to recurring costs and is available to address recurring needs in FY 2025 - \$9.5 million, and
- 4) expense reductions and associated actions allowing previous allocations to be redirected to higher priority needs (reallocation) - \$17.5 million.

Specifically Related to Item #4 above - During the budgeting process, units were asked to respond to reallocation targets to help balance the state appropriation and tuition budget for FY 2025. Each academic and support unit was asked to develop and submit proposals to address assigned reallocation targets at 0.75% of their O&M/State Special and Tuition base, excluding certain

spending items such as student aid, debt, and utilities. Much like the target set in FY 2024, the FY 2025 target is closely aligned with historical trends. Given no additional unrestricted state funding in FY 2025 as well as limited growth in other revenues, reallocations continue to be a necessary tool in balancing the budget. To be successful, operations must become more efficient, and existing resources must be reprioritized.

Units submitted proposals outlining actions to reduce recurring O&M expenditures as well as the projected impact on unit activities and service levels. Although there was a single target communicated in the budget process, this recommended budget for FY 2025 incorporates somewhat different levels of reallocation across the units. Each unit's individual circumstances were reviewed, including specific financial issues and challenges, the tools available to them to address those challenges, priorities in concert with the institution, and the impact of the proposals.

As a result of this process, the budget, as recommended, includes unit-level reallocations ranging from 0.0% to 3.7%, with an average reallocation across the support units of 0.7% and an average across the academic units of 0.9%. These levels are necessary (in conjunction with tuition revenue growth) for covering projected cost increases, the tuition shortfalls experienced in FY 2024 across several campuses, and the compensation investment, as recommended in this budget.

The reallocation plans for FY 2025 (in state appropriation and tuition-funded activities), resulting from a review of all the reallocation proposals to date and the specific budget needs of each unit, total \$17.5 million and include the following:

- A. \$6.8 million (38%) reductions to operations and administration expenses
- B. \$6.9 million (39%) reductions to direct mission expenses
- C. \$2.5 million (15%) reductions yet to be itemized (could be operations, administration, or direct mission)
- D. \$1.3 million (8%) reduction in use of recurring O&M funding by shifting expenses to other funds or nonrecurring funds to meet the general reallocation target (relatively insignificant amounts spread across a number of units)

\$17.5 million total for balancing the state appropriation/tuition budget framework

Consistent across almost all unit FY 2025 reallocation plans, major actions to reduce expenses include changes in personnel costs. Non-personnel spending reductions are also common, although generally of less magnitude. While the total expense reduction amount is significant, it does not represent one or two large initiatives. Instead, it is a collection of individual actions and decisions spread across almost every unit of the University. Plans are well underway, but in some cases the actions have not been completely finalized or communicated within the affected units, so unit-specific examples are not included in this document.

Compensation-Related Expense Reductions - Of the \$13.7 million in identified expense reductions as of this date (items A and B above), \$11.6 million (85%) is planned through a reduction in compensation costs. Actions that units are planning to take to achieve these changes include a combination of the following:

- eliminating faculty and staff positions (through natural attrition),
- hiring replacement employees at a lesser salary than the previous employees, and
- reducing appointments (a portion of FTE) for continuing positions.

Where reductions in the number of funded positions are planned, this generally results in the reassignment of existing work to others or restructuring processes to eliminate work and gain efficiencies.

Operating-Related Expense Reductions - The remaining \$2.1 million (15%) in expense reductions identified at this time will be realized through a decrease in non-compensation spending. Examples of actions that units are planning to take include the following:

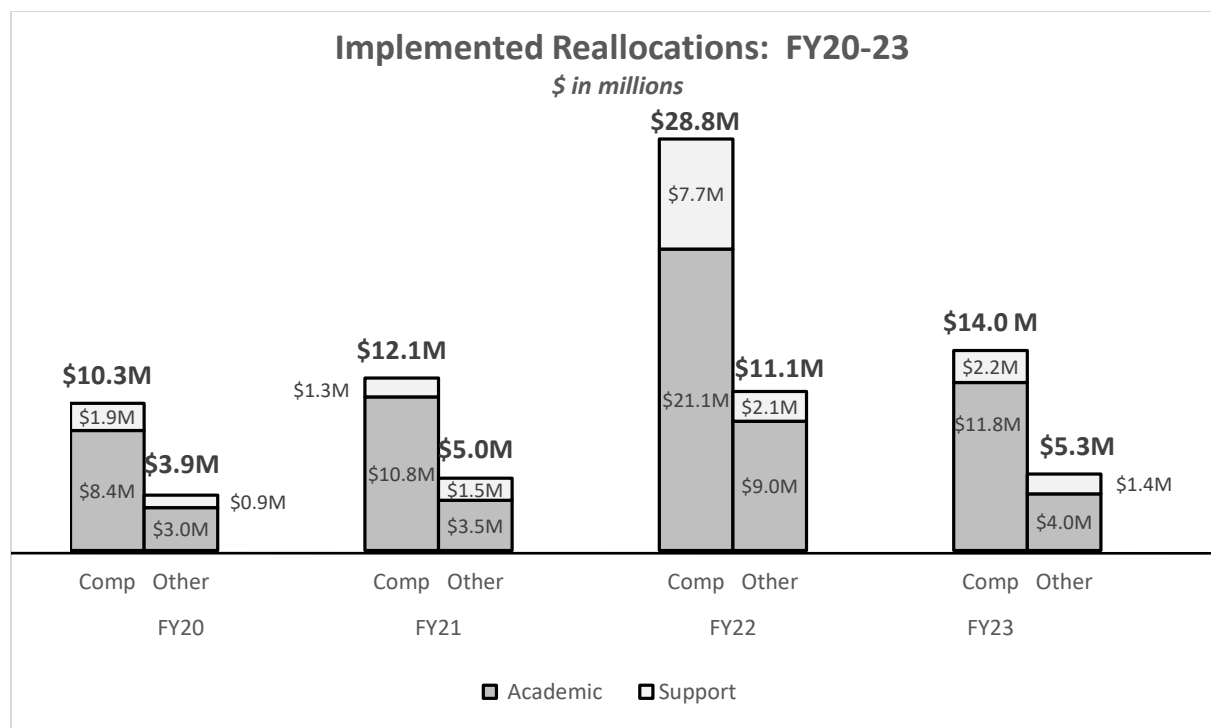
- reducing general operating budgets available for supplies, food, and professional development,
- evaluating the need for professional and consulting services and reducing associated spending,
- reducing travel expenditures by attending conferences virtually and holding meetings in a hybrid or remote format,
- reducing the number of in-person events, retreats, and conferences hosted by the University,
- discontinuing unnecessary leases and reducing rent-related costs by more effectively using University-owned space,
- reducing or eliminating services, programs, and strategic initiatives (e.g., funding available for strategic initiatives, research institutes and educational programs, collegiate-level outreach, and so on).

Other Actions – In addition to recurring expense reductions, thirteen units also proposed other types of actions totaling \$1.3 million in FY 2025 to meet their reallocation needs. These actions include shifting O&M expenses to other funding sources, reducing recurring reserves, and temporary use of balances (under \$100,000). Units proposed these actions when an expense reduction did not make sense for their unit, and they had an alternative.

Tracking and Monitoring

As in previous years, all reallocations will be recorded and tracked. At this point in the FY 2025 process, the approved reallocation plans are not yet implemented and sometimes not yet fully communicated within the impacted units. Campuses, colleges, and support units will be asked to update their FY 2025 reallocation information twice before it is considered final: once during the FY 2026 budget development process (FY 2025 fall and winter) to verify progress toward approved FY 2025 plans alongside applicable additions and changes; and second after FY 2025 ends to confirm final implementation and savings. Final information on implemented reallocations is then recorded and summarized in various ways to document what has taken place.

The following chart depicts the final verified and implemented reallocations for FY 2020 to FY 2023 by unit type (academic and support) and by reallocation type as described above (compensation-related or operating/other reallocations).



Consistently, compensation related expense reductions were 71-73% of the total actions taken, which aligns with the fact that, of total University expenses, greater than 60% is salary and fringe. Within the remaining 35-40% of total University expenses, much is devoted to items that cannot easily be reduced, such as debt service or student aid. The University is a people place, relying on talented employees to deliver the programs, provide the services, care for the facilities and equipment, develop and implement appropriate and compliant procedures, and so forth. And that is true across all support and academic units.

Reallocation totals vary between the academic and support units due to the units' base allocations. In FY 2020, reallocations totaled \$14.2 million, which represents 0.7% of the O&M/tuition/State Special base used to create units' original reallocation targets. Academic reallocations totaled \$11.4 million and support unit reallocations totaled \$2.8 million, each of which represents 0.7% of the base – an even distribution of the implemented reallocations. A similar pattern followed in FY 2021 when \$17.1 million in reallocations were implemented (0.9% of the base). Academic units reallocated \$14.3 million (0.9% of the base), and support units reallocated \$2.9 million (0.7% of the base) that year. In both FY 2020 and FY 2021, the amounts of reallocations implemented were comparable to historical levels.

In FY 2022, reallocations far exceeded historical norms, and, at \$39.9 million (2.0% of the base), were over 100% higher than each of the two previous fiscal years. There was also a significant difference in the implementation of the reallocations when comparing the academic and support units. Academic units implemented \$30.1 million of reallocations (1.9% of the base), and support units implemented \$9.8 million of reallocations (2.5% of the base). The larger reallocation in that year makes more evident a situation that exists to some extent each year: the academic units manage a much broader set of revenues and costs than the support units and, therefore, have more flexibility in their budgets to react to changes from planned budgets. Although the planned average reallocation across all units was 2.5% for FY 2022, when the academic units realized expenses were coming in less than planned and/or there was a growth in other available resources during the

year, they were able to change their original plans and not implement all the cuts originally anticipated. In most years this does not result in a significant variance from original plans, but with the larger numbers in FY 2022, the overall impact was greater. Support units generally do not have that opportunity.

In FY 2023, there was a continued shift toward using other revenues rather than relying entirely on expense reductions. Implemented reallocations were closer to historical norms at \$19.3 million. However, budgeted/planned reallocations totaled \$28.1 million across all units. The gap between budgeted and implemented reallocations was filled primarily by other unrestricted revenue sources (such as ICR) - increases in non-O&M/tuition/state special revenues or available recurring balances were used to cover expenses previously paid for with O&M/tuition/state special funding. In FY 2023, through reallocations, units shifted approximately \$7.4 million of O&M expenses to other unrestricted sources. In FY 2022, reallocation tracking suggests about \$3.7 million of O&M expenses shifted to other unrestricted sources, and, in FY 2021, it was \$1.7 million.

This increased reliance on other revenue sources is not surprising given the overall University budget – the University has, overall, become more dependent on revenue sources outside of its O&M/tuition/state special funds. It is important to note that reallocation tracking has also changed over this timeframe such that the Budget Office is tracking additional data elements (this could be a confounding factor in relation to this trend). Therefore, the Budget Office, through its reallocation tracking process, will continue to monitor increased reliance on other unrestricted resources.

Improving Efficiency and Effectiveness

The University continually reviews its operations to determine ways to become more efficient and effective. As in prior years, this strategy is part of many units' reallocation plans and is reflected in the personnel and non-personnel spending reductions described above. As regularly reported to the Board of Regents, the University is also in the process of implementing the PEAK Initiative to improve service delivery and increase efficiencies in several defined functional support areas. Changes resulting from this initiative began in FY 2023, with budgetary impacts first appearing in FY 2024, which will continue in FY 2025 and likely for an additional year or two. One-time costs associated with implementing this initiative (project costs as well as transitional bridging costs for units) are being covered by the one-time \$10 million contribution from the University of MN Foundation and the nonrecurring central reserves funds approved in the FY 2023 budget for this purpose. The permanent or recurring change in cost structures will not be fully incorporated into the recurring budget until implementation is final when ongoing savings from PEAK will be recorded and can be applied to those recurring costs. At this time, there is not enough information to estimate net PEAK savings after costs, in total or by unit, which will ultimately be redirected to other priorities in the budget.

5. Reallocations in Other Non-Sponsored Funds

In addition to actions necessary to balance the state appropriation and tuition budget, units were instructed to plan for what will be necessary to balance all other non-sponsored fund budgets. The budget management expectation for these funds is that revenues must grow to cover the associated cost increases, or actions need to be taken to reduce costs to a level equal to or less than the available resources. Therefore, as they plan for salary increases and general inflation in the other non-sponsored funds, units must make conscious decisions to cover these costs through a combination of the following:

- estimated revenue growth,

- planned reallocations (actions taken to reduce costs in these other non-sponsored funds) and/or,
- use of balances (only in cases where balances can cover cost growth for a period of years).

The summarized result of these plans is reflected in the estimated revenues and spending levels in Attachment 2: Resource and Expenditure Budget Plan, University Fiscal Page.

B. Summary – FY 2025 Investment Plans

Given the absence of incremental appropriation increases for FY 2025 and the desire to avoid significant tuition rate increases or deep expenditure cuts in critical programs and services, the recurring spending plan for FY 2025 is constrained. The recommendations for investment are focused on three areas: a reasonable pay plan for University employees, the highest priority initiatives impacting operations and the student experience, and required cost increases.

It is important to note that the investments included in the budget and described here are funded through a combination of O&M set aside in the FY 2024 budget, tuition increases, other unit-generated revenue increases, and expense reductions/reallocations. The unique investment items (listed in Attachment 1) should not be viewed as funded only through increased state appropriation going to the unit for these purposes. Instead, they should be viewed as decisions to invest through the combined use of the set-aside state appropriation PLUS unit-generated revenues, internal reallocations, and tuition.

1. Compensation

Salaries –Information in this document related to compensation matters has been prepared as a budget recommendation for planning purposes and should not be interpreted as a commitment to increase the salary of every individual or as an attempt by the University to disregard good faith bargaining with affected employee groups or to ignore all other mandates of the Public Employer Labor Relations Association (PELRA).

Within that context, the President’s Recommended FY 2025 Annual Operating Budget includes a 4.00% salary pool increase based on the current funding base for labor-represented employees and a 3.0% merit pool increase based on the current funding base for the following employee groups:

- Faculty (including UEA-represented faculty)
- Non-faculty Academic and Administrative Employees (P&A)
- Civil Service
- Graduate Assistants
- Undergraduates

The 3.0% increase will be implemented by a separate merit-based process for each of the groups listed above rather than across the board. Within the 3.0% pool for undergraduates, the minimum pay per hour will be increased from \$15.00 to \$15.25.

Market adjustments for individual employees (beyond the merit increases) may be funded by budgeting units if they have resources available through growth in “other revenues” or through a choice to make reallocations beyond those described in this document.

In addition, this recommended budget includes a separate investment to raise the minimum realized hourly pay for Civil Service and P&A employees to \$20 per hour. This will be implemented regardless of funding source. The additional cost for state and tuition-funded positions is \$188,000 (included in Attachment 1), and in all other funds, it is \$556,000.

Fringe Benefit Rates - In all categories, the fringe benefit rates charged to departments for FY 2025 will be lower than those for FY 2024. Because the federally approved methodology required for setting fringe benefit rates relies on a lagged set of variables, the increase for FY 2025 is largely due to an over-recovery in the 2022-2023 timeframe and continued growth in the salary base for FY 2023 compared to prior years. The reduced fringe rates are not a reflection of a reduction in the actual cost of benefits: rates will increase over time as costs increase.

	<u>Actual 2023-24</u>	<u>Approved 2024-25</u>
Academic/Police	37.1%	36.6%
Civil Service/Labor Represented	33.5%	32.3%
Partial Benefits (Trades, Temp Casual, Residents/Fellows	7.7%	7.4%
Student Professional with UPlan Health	27.1%	25.9%
Student Professional with GA Health	25.1%	23.2%
Undergrads/Professionals in Training	0.0%	0.0%
Graduate Assistants – Tuition Benefit	\$22.41/hr	\$23.08/hr

Based on the above assumptions, the FY 2025 increased cost for salaries and fringe benefits combined is \$35.9 million funded by state appropriations and tuition.

An additional projected cost increase based on these parameters of \$25.3 million for salaries paid by other non-sponsored funds (gifts, sales, fees, federal appropriations, etc.) and \$10.0 million for salaries paid by sponsored grant funds will be paid for through increases in those revenue sources or spending reductions in those funds.

This budget also estimates cost increases related to the combination of new hiring and promotion and retention costs in addition to the implementation of the plans just described. Those costs are funded, like market adjustments, with resources available through growth in “other revenues” or through a choice to make reallocations beyond those described in this document. Incorporating these costs, the full projected increase in salary costs included in Attachment 2 (the University Fiscal Page) is \$105 million or 3.5%, rather than 3.0%.

2. Five Categories of Framework Investment in Academic and Support Unit Activities (Attachment 1) – total non-compensation investment items - \$63.0 million

The investments identified in Attachment 1 and described in the five categories below are recommended as part of the overall budget framework. They are to be funded from the combination of the FY 2024 set-aside state appropriation, recommended tuition rates and enrollment projections and the resulting revenues, growth in miscellaneous revenues that units are putting into the framework, and internal unit reallocations. Each item has been reviewed as part of the budget development process between central and unit-level leadership and is recommended by the Interim President for inclusion in the budget.

a. Investment in Core Operations and Services - \$19.4 million

Within this category, roughly \$11.2 million will be directed to address units with “structural imbalances.” These are situations where revenues from tuition and/or other external sources have decreased, or critical expenses have grown significantly over the last several years without commensurate growth in resources. For FY 2025, \$10.6 million of the \$11.2 million is related to known unsolved imbalances in the FY 2024 budget; cases in which the FY 2023 tuition shortfall was not completely solved on a recurring basis, and nonrecurring balances were used in FY 2024 as a bridge. In these cases, further reallocation or increased revenues (O&M or other) are needed to replace that lost revenue from the prior year (and cover cost increases) rather than fund program or service enhancements. To help prevent a continuation of pushing challenges into future years, the FY 2025 budget is solving all but three existing structural imbalances. For the Carlson School of Management, the Duluth campus, and the Morris campus, balances will be applied on a one-time basis to bridge a portion of their structural imbalances that will be addressed in the FY 2026 budget. This strategy is focused on the three units with the largest imbalances in order to prevent crippling budget reductions in one year when future revenue growth or strategic cuts are planned for the following year.

A second grouping in the general operating budget support category includes a variety of more technical adjustments. For two examples: 1) a portion of the gross increase in tuition surcharge revenue for three colleges on the Twin Cities campus and the Swenson College of Engineering on the UMD campus must be spent on need-based scholarships for impacted students; and 2) for the Carlson School of Management and the UMD campus, a portion of the gross increase in tuition revenue will be turned around as planned scholarship increases as a form of “tuition discounting” to recruit students. In both cases, the gross revenue is recorded as a revenue increase, so the offsetting expense must be recorded/invested to not overstate a positive effect on the unit’s budget. These items are few but are critical in accurate budget planning.

Finally, this category also includes targeted investments in critically needed service areas facing significant cost increases from inflation or compliance requirements. Examples include:

- library collections/subscriptions cost increases,
- compensation costs over and above University increases for “trades” employees,
- important positions related to compliance – athletic compliance and contract management in the Office of the General Counsel, senior support in Equity and Diversity, an HR lead in the Office of Human Resources, and an Enterprise Risk Manager.

b. Program/Compliance - \$17.4 million

The largest group of investments in this category (\$12.5 million) represents decisions to direct uncommitted resource gains in FY 2025 (after addressing framework cost increases) to initiatives that will advance the goals of MPact 2025 and meet the needs of students. Colleges with these resources will invest in the faculty, equipment, and support services necessary to serve growing enrollments generally or to meet the program needs of high demand or targeted areas of study. The most significant example will be increased support for the needs of Computer Science and Engineering, a program with significant enrollment growth.

A second set of program investments in this category are for improvements related to varying types of security and compliance: a major effort to modernize the data warehouse and reduce the risk of cyber security attacks; ongoing support for the sexual misconduct prevention program; a position

to plan and strategize infrastructure needs around public safety; a series of research process/program focused positions and support to increase compliance, and so forth.

Finally, this category includes significant investments to improve the University's relationships with constituents, including the public, legislators, and state officials, and potential students. Funding will be provided for expanding marketing and communications, for building a re-energized and strengthened government relations function, and for reaching more potential students in Minnesota counties outside of the metropolitan area and across the nation.

c. FY 2024 Tuition Revenue Challenge - \$16.4 million

In FY 2024, the net total tuition revenue variance is expected to be -\$6.9 million (shortfalls of \$16.4 million across fourteen units offset by \$9.5 million of surpluses in the remaining eleven units). This result is just -0.7% of total tuition revenue, so the budget was 99.3% accurate. However, for the units where the shortfalls exist, this represents a recurring loss of revenue that must be addressed through increases in other revenues (primarily tuition revenue gains the following year) or expense reductions because the funds were planned to cover recurring costs. It becomes a structural imbalance that could eventually lead to deficit situations if it is not addressed. The negative variances by unit for FY 2024 range from \$33,000 to \$3.3 million. The FY 2025 budget covers these tuition variances as an investment; solving the recurring shortfalls in most cases by applying tuition revenue growth, the reserved state appropriation, and internal reallocations; and in some cases, by planning for future expenditure reductions or increased revenues while bridging the FY 2025 shortfall on a one-time basis with unit level balances and/or central resource transfers (described below in the nonrecurring investments section).

d. Facilities and Technology Infrastructure - \$9.1 million

Within this category of investments, lease costs are projected to decrease (\$0.3 million), but that is offset by a growth in costs from the annual contractual obligations for systems software (\$2.4 million), an increase in debt service requirements (\$3.6 million), an increase in new building operations (\$0.2 million) and an increase in projected utility costs across all campuses (\$3.2 million). These costs are required obligations that must be included in the investment plans.

e. Institutionally Managed Student Financial Aid - \$668,000

For FY 2025, the President recommends an increased recurring investment in student aid in one area: to meet the obligations of matching endowment payouts associated with the President's Scholarship Match Program. Investment includes \$368,000 for undergraduate scholarships and \$300,000 for professional student scholarships. Changes to federal Pell Grants and the Minnesota State Grant program are explained in section III-A.

The full list of items for these five categories is provided in Attachment 1.

3. Nonrecurring Items - Total - \$46.8 million

Attachment 1 also identifies recommendations for various one-time allocations to supplement the recurring investments outlined above. Due to the availability of significant one-time funds in central reserves, this FY 2025 budget includes a larger investment in nonrecurring items than is typical. It offers an opportunity to move forward in a number of areas requiring one-time investment to cover nonrecurring costs and pandemic-related deficits, to launch programmatic

enhancements, and to bridge recurring spending in anticipation of future revenue growth or expense reductions. The circumstances driving this opportunity are explained further in the Central Reserves section of this document (section V-B-1). Beyond the Central Reserves balance, other resources for the one-time investments outlined in Attachment 1 include a portion of the carry-forward funds in central O&M accounts (unspent allocations from prior years), a central balance related to the enterprise systems financial model, and the UMF Fund for University Strategic Initiatives.

One category of substantial nonrecurring investment is related to three units facing significant financial challenges in FY 2024 that carry forward into FY 2025. Two of these three units, the Carlson School of Management (CSOM) and the Duluth campus experienced tuition shortfalls compared to the budget in FY 2024 and are projecting further enrollment declines in FY 2025 (graduate level only for CSOM). The combination of increased tuition rates, increased O&M allocations and required internal reallocations greater than the initial targeted levels will not be enough to offset the costs of the compensation plan, other unique expenditure obligations that differ by unit, and the negative tuition budget variances experienced this year. After calculating and applying these budget variables for both units, \$6 million in additional recurring needs must be addressed. This budget recommends that the University cover this level of projected FY 2025 shortfall with nonrecurring bridge funds from Central Reserves. For the third unit, this budget recommends a one-time allocation from Central Reserves of \$1.5 million to Student Finance to support scholarship requirements for nonresident student-athletes, an action that will support Gopher Athletics' budget for one year as they adjust to the transforming landscape of student support in Division I sports.

Additional nonrecurring items on Attachment 1 advance efforts directly tied to achieving the goals of MPact 2025, strategic investments moving into the next administration, and addressing past costs of operations. Some of the more significant items include \$5 million for a discretionary pool for President Cunningham to address her initial priorities, \$12.4 million to eliminate accumulated deficits in the housing and dining functions across the campuses directly tied to refunds and reduced occupancy during and just after the pandemic, \$9.3 million to cover final litigation costs for closed cases, \$3.4 million to adequately staff the Office of Information Technology while working to enhance capacity through PEAK over the next two years, \$1.3 million to upgrade key pieces of equipment to support research activities, and \$1.2 million for campus-specific enrollment marketing efforts across two years.

Finally, beginning in FY 2023, the University of Minnesota Foundation dedicated \$7 million to the "UMF Fund for University Strategic Initiatives." The fund, through a memorandum of agreement between the University and UMF, is to be allocated to the Office of the President to be used to advance University strategic initiatives, with specific priority for those initiatives identified as part of MPact 2025. The Fund was created after the start of FY 2023 and was to be available until fully allocated, which will occur with this FY 2025 budget. By year, the activity for this fund is as follows:

FY 2023 Allocations – Total = \$1,160,000

- \$500,000 - Systemwide Enrollment Marketing
- \$660,000 - System Campus Plans (FY 2023 costs)

FY 2024 Allocations – Total = \$3,484,000

- \$1,320,000 – System Campus Energy/Utility Plans (FY 2024 costs)
- \$550,000 – UMR Bluff Top Plan
- \$275,000 – CLA Writing Initiative

- \$260,000 – Mimbres Repatriation
- \$200,000 – Next Gen Badge Program at UMC
- \$200,000 – Campus Climate Survey
- \$150,000 – Heritage Studies Master’s Program – Student Aid
- \$340,000 – System Campus Plans (FY 2024 and FY 2025 costs)
- \$100,000 – President’s Postdoctoral Fellowship Program/Faculty Bridging
- \$89,000 – Institute on the Environment - Engagement

FY 2025 Allocations - Total = \$2,356,000 – (included on Attachment 1)

- \$530,000 – BSL 2/3 Lab Maintenance
- \$350,000 – ESports Start Up at UMC
- \$350,000 – International Student Services Programming
- \$250,000 – All Gender Restrooms
- \$200,000 – American Indian/Indigenous Studies PhD Program
- \$174,000 – Heritage Studies/Public History Program
- \$154,500 – Juneteenth Activities
- \$150,000 – Faculty Research Engagement Fund
- \$121,000 – Expansion of Admissions/Recruiting EAB Contract
- \$45,500 – Consortium on Law and Values
- \$31,000 – Last Mile Delivery (partial costs)

C. Summary – Changes in Other Rates and Fees

1. *Internal Sales and Auxiliaries*

There are a variety of rates charged by University units that fall under the definition of Internal Sales or Auxiliary Enterprises (see Attachment 5: Definitions of Current Sponsored and Non-Sponsored Funds). The proposed internal sales rates and a review of the processes used to arrive at them are built into the cyclical rate review process carried out by the Controller’s Organization. A review of the proposed auxiliary rates and fees for the upcoming year is incorporated into the annual budget development process. The all-funds Resource and Expenditure Budget Plan in this document, as displayed in Attachment 2, incorporates the proposed Internal Sales and Auxiliary rates as part of the projected revenue for FY 2025.

Though the specific rates and charges for these services vary broadly, Table 3 below reflects the average anticipated increases for each service area by campus. These rates have been developed and recommended for approval after a full review and consultation with each campus. In addition, the room and board rates are reflected in the “change in tuition, fees and, room and board” information displayed earlier in this document.

Table 3
Auxiliary Rate Increases - Average Fee Increase for FY 2025

<u>Campus</u>	<u>Room and Board</u>	<u>Contract Parking</u>
Crookston	2.8%	0.0%
Duluth	8.9%	4.6%
Morris	6.0%	3.0%
Rochester	5.2%	0.0%
Twin Cities	6.5%	0.9%

The increased room and board rates across all campuses are primarily driven by inflationary cost pressures associated with compensation, food, and supplies. In addition, several of the campuses are investing in campus-specific improvements to better serve and support their students. Additional details on each campus are included below:

- Crookston: The 2.8% blended rate increase for room and board is driven by a 3.0% increase in the board rate and a 2.6% average increase in double room rates to cover inflationary increases in compensation, utilities, and supplies. The campus continues to manage an ongoing nonrecurring deficit in dining by increasing revenues and managing expenses. This FY 2025 recommended budget includes a planned nonrecurring allocation of \$200,000 to offset a portion of that deficit.
- Morris: The blended rate increase of 6.0% in the room and board rate (a 6.0% increase in both the room and board rates individually) is driven by inflationary increases in compensation, utilities, and supplies as well as additional costs associated with a new dining contract. The Morris campus is also projecting a nonrecurring deficit in housing and dining in FY 2024 and is minimizing that deficit by managing expenses. This FY 2025 recommended budget includes a planned nonrecurring allocation of \$400,000 to offset a portion of that deficit.
- Duluth: The increased room and board rate (blended rate increase of 8.0% for a double room and 9.6% for the unlimited meal plan) is driven by general inflationary cost increases for compensation, food, and supplies, an expected increase of 12% in utility costs, and continued refurbishments and renovations to housing and dining facilities. The Duluth campus is not projecting an operating deficit in its auxiliaries for FY 2024.
- Rochester: The 5.2% rate increase in room and board on the Rochester campus (blended rate increase of 5.3% for a double room and 4.9% for the unlimited meal plan) is based on the campus' continued assessment of housing occupancy, dining revenues, and expenses associated with its new room and board offerings that began in FY 2024. Rochester's Student Life Center opened in fall 2023, and the campus began offering a meal plan for students living in the Student Life Center (a meal plan was not offered previously). Given its new facilities and meal plan offerings, the Rochester campus expects an operating deficit in housing and dining for FY 2024. This operating deficit will decrease in FY 2025 with the rate increases noted above and increased occupancy for the Student Life Center. In addition, this FY 2025 recommended budget includes a planned nonrecurring allocation of \$400,000 to offset a portion of that deficit.
- Twin Cities: The room and board rate increases (blended rate increase of 6.5%) include a 6.0% increase in residence hall rates and a 7.2% increase in the dining rates. Residence hall increases will be used for standard inflationary increases in compensation, utilities, and supplies, as well as to provide funding for additional safety enhancements in the residence halls. The 7.2% increase in dining rates will pay for cost increases associated with compensation, food, supplies, and other operating costs. The room and board rate increases on the Twin Cities campus are not expected to fully cover FY 2025 costs. However, this FY 2025 recommended budget includes a planned nonrecurring allocation of \$11,400,000 to offset a portion of the accumulated deficit since the pandemic, and with similar rate increases over the next several years, remaining structural imbalances are expected to be eliminated.

The Duluth, Morris, and Twin Cities campuses are increasing parking rates in FY 2025. Each campus is raising rates for specific investments and inflationary costs:

- The 3.0% rate increase for the Morris campus will support ongoing maintenance of the parking lots.
- The proposed increase to contract parking rates on the Twin Cities campus (including monthly rate increases of 3.7% for parking lots, 0.9% for ramps, and 0.7% for garages) is driven by investments in parking and transportation infrastructure and capital.
- The Duluth campus's 4.6% proposed parking permit increase (from \$325 to \$340/year for the most utilized pass) is based on an analysis of historical data, future demand projections, comparable market rates, compensation increases, utility increases, and renovation projects for campus safety (including cameras and lighting). In addition, Duluth's 2016 Parking & Transportation Study recommended a market rate adjustment to reflect the current supply and demand and a pricing structure to encourage alternative transportation modes and control parking demand. These helped to inform the proposed rate changes. This stepped adjustment over a multi-year period is intended to trend Duluth toward local and other university parking rates.

2. Course Fees, Fees in Lieu of Tuition, and Administrative/Misc. Term Fees

Each request for a new course or miscellaneous term fee, or any increase in an existing fee, is reviewed through the budget process. All fee proposals requested by units require an updated justification and rate development analysis. Attachments 6 and 7 list all proposed fees recommended for approval at this time. Each of the fees meets the parameters established in Regent policy.

Course fees are supplemental to tuition for costs unique and essential to the specific course to which they apply. Administrative guidelines outline specific cost examples to aid in implementing the policy and ensuring compliance with the policy intent. The most common examples of costs "unique and essential" to the particular course include transportation for field trips, items consumed during the course or produced and retained by the student as a result of course work, and special talents purchased for help in the delivery of the course (e.g., art models, speakers, etc.). A course fee listed in Attachment 6 may apply to only one course, or it may be applied to multiple courses that meet the same definitions and cost structures for which the fee is proposed.

Miscellaneous Term fees vary in their purpose and structure but generally either address a benefit that is common to all students enrolled on the campus (capital enhancement fee, stadium fee) or is unique to the circumstances of the individual (testing fees, locker rentals, late payment fees, study abroad fees, etc.).

Some of the fees in these categories are "fees in lieu of tuition," which are charged in situations where the total program cost is packaged in a way that better lends itself to a comprehensive fee structure. These are often implemented in a split manner (tuition vs. fee portions) for tax reporting purposes but are communicated to the students as a comprehensive fee. The two primary purposes for this type of fee are the College in the Schools Program in state law and programs requiring domestic and foreign travel implemented through the colleges and the Learning Abroad Center. Fees in lieu of tuition are technically implemented either as a course fee (based on registration for a

course assigned this fee) or as a term fee (registered for a term-based program assigned this fee), so they are included in either Attachment 6 or 7.

New for FY 2025, this budget includes recommended implementation of a new Course Works term fee for course materials. There are two potential paths for students:

- **Course Works Complete Path** - a flat-rate textbook and course materials program that delivers day-one access to course materials for all degree-seeking undergraduates. Similar to a subscription model, students pay one price per semester, fall and spring, for access to required course materials (digital and printed). Students can opt-out of the fee before the census date (typically two weeks into the semester). This optional course materials fee is included in the recommended budget at \$279 per semester (fall and spring).
- **Course Works Select Path** – undergraduate students who opt out of “complete” (previous bullet), non-degree students, and graduate students whose instructors have chosen inclusive access delivery for their course materials are automatically on this path, where they can opt out of the identified materials on an individual item-by-item basis. On this path, students can expect to pay anywhere from \$1 - \$500 for their chosen materials and the charge will be added to their fee statement.

This approach was chosen after considerable analysis and consultation and because it offers greater opportunity for cost certainty, convenience, student success, and environmental sustainability (increased digital materials = reduction in carbon footprint with fewer items printed, shipped and warehoused).

The all-funds budget recommended in this document, as displayed in Attachment 2, includes an estimate of revenues derived from these fees for FY 2025 as part of the “Sales, Fees, and Misc.” category.

3. Academic Fees - Campus/Collegiate Fees and Durable Goods Fees

The definition of “Academic Fees” within the Regents Policy: *Tuition and Fees* categorizes the purpose of these fees into two specific types:

- **Campus Collegiate Fees:** For “goods and services that directly benefit students but are not part of actual classroom instruction.” Allowable goods and services include advising, career services, computer labs, special equipment, orientation activities, and other goods or activities intended to enhance the student experience outside of the actual classroom or online instruction.
- **Durable Goods Fees:** Fees for educational materials and equipment that will be owned by, potentially owned by, or assigned to a specific student for their use during the entire term. Durable goods fees may not be charged for services, or for use of equipment owned and retained by the University, except for computers or other specialized equipment assigned for a full term to a specific student.

Attachment 8 contains the list of proposed academic fees recommended for approval. These fees, including their purpose and specific levels, have been reviewed through the budget process. This budget recommends a new approach in changes to the academic fees: generally, these fees will increase at the same rate as the recommended resident undergraduate tuition rate on each campus, unless there is a compelling rationale for either a lower or higher rate of change for any particular fee. In many cases the percentage change does not exactly equal the tuition rate change due to the desire for reasonable dollar values (avoiding cents, moving to the nearest \$5 increment etc.). For

FY 2025, each of the academic fees on Attachment 8 are increasing in alignment with this approach, with the following exceptions:

- College of Continuing and Professional Studies – increasing 10.5% (from \$190 to \$210 per term); a more substantial adjustment is necessary to cover costs and maintain current levels of service given that this fee has not increased for four years.
- College of Food, Agriculture and Natural Resource Sciences – increasing 30% (from \$250 to \$325 per term); a more substantial adjustment is necessary to cover costs, maintain current levels of service and address a structural imbalance that emerged over time as the fee was not increased from FY 2016 through FY 2022 while costs increased.
- UMC Campus – increasing 0%; attempting to hold fee-funded costs down or shift to other revenue sources to aid in student recruitment efforts.
- UMD Campus - increasing in the range of 2.3%-4.9% (\$8-\$13 per term) – varies by college; more substantial adjustments are necessary to cover costs as the campus has routinely only increased these fees in line with inflation and compensation costs, so to not reflect that in FY 2025 would create a structural imbalance.

With the implementation of these changes, the academic fees for full-time students in fall and spring terms range across all units from \$52 (Medical School – Mortuary Science) to \$606 (Carlson School of Management) based on services and programming unique to each school.

The all-funds budget recommended in this document, as displayed in Attachment 2, includes an estimate of revenues derived from these fees for FY 2025 as part of the “Sales, Fees, and Misc.” category. The revenue is impacted by rate as well as enrollment levels, which in some cases are estimated to be lower than in FY 2024.

4. Student Services Fees

Attachment 9 outlines the recommendations to the Board regarding student service fees at all campuses for FY 2025. These fees have also been incorporated into the ***Change in Tuition, Fees, and Room and Board FY 2024 vs. FY 2025*** information displayed previously in this document. Student service fees are subject to campus-based processes involving a “Student Services Fee Committee,” which, by Board policy, shall have at least a student majority. The Student Services Fee Committees recommend the full set of fees in this category to the Vice President for Student Affairs for review. In most cases, the fee increases are deemed necessary to cover the increased costs of the student-focused services and operations funded through this process (health programs, recreation programs, student government organizations, and so forth). Employee salary increases, coupled with inflation on purchases and a declining total fee-paying population in some cases, lead to most of the recommended increases in these fees for three campuses, while two campuses are recommending 0% or -0.5% changes in the fees. Note that the UMD campus recommendation incorporates an increase in the Capital Improvement Fee from \$5.05 to \$20.00 per semester to align with the 2023 UMD Campus Plan Update and future capital needs for campus support services and programs, particularly future funding needs for a new UMD Health Services facility. There are also minor programmatic or service enhancements embedded within the recommendations: additional professional performance events at UMC, and a project manager and telehealth support for Boynton Health on the TC campus, for example.

The proposed fee increases subject to the following legislation from 2017 are less than the mentioned “greater than 2%” threshold (as indicated in Attachment 9):

*“Subdivision 1. **Referendum.** The governing body of a public postsecondary institution must not increase mandatory student activity fees by greater than two percent relative to the previous academic year unless the increase is approved by a majority of students voting in a campus referendum. This section does not apply to fees paid by students that are directly related to academic, administrative, health services, or debt obligations, including bonds issued under sections 136F.90 to 136F.98. The Board of Regents of the University of Minnesota is requested to adopt a policy implementing this section.*

*Subdivision. 2. **Penalty.** If the Board of Regents of the University of Minnesota increases mandatory student activity fees by more than two percent without approval by a vote of the student body as described in Subdivision 1, the commissioner of management and budget shall deduct from the university’s appropriation base an amount equal to one percent of the university’s appropriation base in the first year of the next biennium.”*

The remainder of this document is a summary of the all-funds budget for FY 2025.

V. All Funds Budget – Revenues

A. Non-Current Funds

Since expenditures in these funds can change significantly from one year to the next, budgets for non-current funds are less predictable than the budgets for current funds. Noncurrent funds can generally be classified into one of the following fund groups:

- 1) Plant Funds – Most non-current expenditures are contained within the plant funds. These funds are to account for property, plant, and equipment transactions of the University. The spending pattern in this area varies depending upon capital project construction timetables and available financing from external sources such as State of Minnesota general obligation bonds. Plant fund activities (capital projects over \$500,000) are summarized in the annual capital budget presented to the Board of Regents for review in May 2024 and action in June 2024.
- 2) Endowment and Similar Funds – The resources included in endowment and similar funds are a combination of gifts made to the University that contain specific stipulations as to the preservation of principal and additions to existing endowments in the form of investment income and market value fluctuations. Projections of the total change in endowment and similar funds are difficult to make because these funds are subject to market risks and fluctuations in contributions. Separate periodic reports are provided to the Board of Regents on the status of these funds.
- 3) Loan Funds – These funds are designated for student loans, which are provided by the federal government, the State of Minnesota, and private donors. The loan fund is the smallest group of non-current funds. Additions to the fund consist of interest received on outstanding loans (when applicable) and new contributions.

Noncurrent funds generally do not support the University’s daily operations and therefore are not detailed within this document.

B. Current Funds

Current funds support the day-to-day activities of the University and can be grouped into two categories:

- 1) Non-sponsored Funds
 - Centrally Distributed and Attributed – Funds distributed or attributed by the Board of Regents, which may be further distributed to a unit or department by a central, collegiate, or administrative office (largely state appropriations and tuition, but also includes indirect cost recoveries on sponsored grants and central reserves).
 - Self-Sustaining – Funds in which expenditures are supported by revenues earned by the internal or external sale of goods or services, clinical income, fees, federal appropriations, non-sponsored grants and contracts, endowment earnings, or gifts.
- 2) Sponsored Funds (sponsored research/public service) – Funds provided by a grant or contract that Sponsored Projects Administration administers within the Office of the Vice President for Research.

For FY 2023, the most recent year of actual resource and expenditure information, current fund revenues for University operations totaled approximately \$4.7 billion. Attachment 5 contains the definitions of all current non-sponsored and sponsored funds. Table 4 outlines the major funding sources supporting FY 2023 expenditures, updated estimates of these sources for FY 2024, and the proposed budget for FY 2025.

Table 4
Current Fund Revenues
Sponsored and Non-Sponsored

<u>Funding Source</u>	<u>FY2022-23</u> <u>Actual Revenues</u>	<u>FY2023-24</u> <u>Estimated</u>	<u>FY2024-25</u> <u>Proposed Budget</u>	<u>FY25</u> <u>% of Total</u>
Operations & Maintenance Approp.	\$621,968,000	\$686,558,000	\$676,294,000	13.3%
Tuition (w/waivers)	1,025,125,136	1,044,306,142	1,086,454,943	21.4%
State Specials	94,386,684	106,138,000	103,445,000	2.0%
Indirect Cost Recovery	222,154,133	236,362,696	236,990,918	4.7%
Federal Appropriations	15,646,478	18,322,333	19,800,000	0.4%
Grants & Contracts/Misc.	359,239,692	370,016,883	384,817,558	7.6%
Private Practice	154,225,127	158,882,781	165,238,092	3.2%
Internal Sales	264,255,442	282,555,620	293,857,845	5.8%
Gifts & Endowment Income	338,569,119	342,536,501	357,950,644	7.0%
Auxiliary Enterprises	416,754,661	429,257,301	457,159,026	9.0%
Sales, Fees and Misc. Income	<u>428,570,855</u>	<u>453,561,847</u>	<u>471,704,321</u>	<u>9.3%</u>
Subtotal Current Non-Sponsored	\$3,940,925,327	\$4,128,498,104	\$4,253,712,346	83.7%
Sponsored Funds (direct)	<u>\$772,939,854</u>	<u>\$790,000,000</u>	<u>\$830,000,000</u>	<u>16.3%</u>
Total Revenue	\$4,713,865,181	\$4,918,498,104	\$5,083,712,346	100.0%

Revenue Summary by Fund Group

The Interim President's Recommended Annual Operating Budget comprises current, non-sponsored funds representing 83.7% of all fund resources. The budget also includes estimated resources for current sponsored funds, which comprise the remaining 16.3% of annual current fund resources. A brief overview of the FY 2025 revenue summary for each of the existing fund categories follows.

1. Centrally Distributed and Attributed Funds

Operations and Maintenance Fund

The financial plan for the Operations and Maintenance Fund is based on resources derived from state appropriations, financial services fees, the Enterprise Assessment, and transfers-in from central reserves. Resources available for FY 2025 are projected to be \$717,229,419. This represents a decrease in resources of \$8,358,635 as compared to FY 2024, driven by the following:

- The balance available from the previous year is estimated at \$1,905,365 more than that available in FY 2024.
- The state appropriation is \$10,264,000 less than that available in FY 2024 due to the removal of two one-time appropriations: \$10,000,000 for the CentraCare/Medical School campus in St. Cloud and \$264,000 for ensuring access to menstrual products.
- Three resources into the fund are estimated to remain flat:
 - Resources from the Enterprise Assessment (internal assessment to support the enterprise system replacement projects),
 - The application/misc. fees, and
 - Other income into the O&M fund from miscellaneous fees and from the transfer related to the American Indian Scholars Program (from the MN Office of Higher Education).
- The transfer-in from Central Reserves to support the O&M operating budget is also recommended to remain equal to the transfer in FY 2024.

Tuition

Estimated tuition revenue is increasing by \$42,220,518 between FY 2024 and FY 2025. The increase results from the proposed rate increases described earlier in this document, coupled with estimated increases and decreases in enrollment (varies by unit), and the phase-in of the tuition surcharge at UMD. More specifically, the revenue estimates for FY 2024 are based on:

- \$17.7 million – associated with a 4.5% increase for the undergraduate resident rate and the surcharges on the Rochester and Twin Cities campuses,
- \$7.0 million - associated with a 5.5% increase for the undergraduate nonresident rate on the Twin Cities campus,
- \$1.2 million – associated with a 1.5% increase of the resident undergraduate and nonresident (where applicable) rates on the Crookston, Duluth, and Morris campuses,
- \$12.3 million – associated with general graduate school rate increases of 4.5% (resident) and 5.5% (nonresident), plus varying unique changes recommended for other graduate and certificate programs and professional programs (detailed in Attachment 4),
- \$3.6 million – net increase associated with enrollment growth projected for twelve tuition generating units, and
- \$352,000 – associated with the June 2021 Board approval of a \$250/semester tuition surcharge for undergraduate students in the Swenson College of Science & Engineering on the Duluth campus phased in over four years, beginning with students entering fall 2021 – so FY 2025 is year four of the four-year phase-in.

Attachment 10, Fund Forecast – Centrally Distributed and Attributed Funds, identifies the tuition estimates for FY 2024 and FY 2025 by college, campus, and support unit. Under the institutional budget model, 100% of the tuition revenue is attributed to the units that generate it.

State Specials – Appropriated in the Higher Education Bill

Revenues from the state specials available for FY 2025 total \$94,845,000. This is equal to the appropriations for FY 2024. These appropriations (unless otherwise noted) are recurring base amounts available to support general operating costs of the programs/activities identified in the law.

The state specials by appropriation for FY 2025:

Agricultural Special	\$42,922,000
Health Sciences Special	9,204,000
Technology Special	1,140,000
System Special	9,181,000 (\$2 million nonrecurring)
Mayo/University Partnership	7,991,000
Cigarette Tax	22,250,000
MN Care	<u>2,157,000</u>
Total	\$94,845,000

The allocation of these appropriations by unit is included in Attachment 10: Fund Forecast - Centrally Distributed and Attributed Funds.

Indirect Cost Recovery (often referred to as “F&A” or Facilities & Administrative Costs)

The financial plan for indirect cost recovery funds is based upon estimated resources derived from the reimbursements received from sponsors to cover a portion of the “overhead/facilities and administrative” costs associated with sponsored research. For FY 2025, available indirect cost recovery resources are estimated to be \$236,990,918. This represents an all-time high for this resource and is an increase available for distribution of \$628,222 (0.3%) compared to the estimate for the previous year, based on projected grant activity. Uncertainty of funding available from some of the federal agencies in recent years combined with continued competition from research institutions and the hesitation of campuses and colleges to budget based on applications as opposed to known awards are responsible for the relatively flat estimate moving into FY 2025.

The last four-year F&A (facilities and administrative cost) rate agreement was signed on March 1, 2020, and was established for FY 2020 through FY 2023. Negotiations for a new rate agreement with the U.S. Department of Health and Human Services are ongoing, so the FY 2023 rates will continue to be in place until a new rate agreement is established. Depending on the specific grant and the sponsor involved, units apply the applicable rate from the table below (or a lesser rate agreed to with the sponsor and approved by the Vice President for Research) to the direct budgeted expenses of the grant to estimate the F&A or Indirect Cost Recovery return.

Award Type	FYs 2020-21	FYs 2022-23	FYs 2024-25*
On-Campus Research	54%	55%	55%
On-Campus Public Service (a.k.a. Other Spons. Activities)	33%	35%	35%
On-Campus Instruction	50%	50%	50%
Hormel Institute	55%	59%	59%
Dept. of Defense Contracts	57%	57%	57%

Off-Campus Projects	26%	26%	26%
* The FY 2023 F&A rates will be used until new rates are approved. Negotiations with the U.S. Department of Health and Human Services are ongoing.			

Attachment 10, Fund Forecast – Centrally Distributed and Attributed Funds, identifies the ICR estimates for FY 2024 and FY 2025 by college, campus and support unit. Under the institutional budget model, 100% of the ICR revenue is attributed to the units that generate it.

Central Reserves

The primary revenue source for the central reserves fund is investment earnings from the temporary investment pool. The purpose of this fund as reflected in the uncommitted available balance is to insulate the University from potential major financial risks, including:

- Unanticipated or uninsured catastrophic events
- Temporary institutional revenue declines or expenditure gaps
- Unforeseen legal obligations and costs
- Failures in central infrastructure
- Failures of major business systems

Board policy guidelines indicate the uncommitted available balance should be \$25 million or 4% of the current year's state appropriation, whichever is greater. For FY 2025, the goal for the balance will be \$30,845,560 (4% of the appropriation). After allocations and transfers (changes for FY 2025 explained below), the central reserves balance is projected to be \$118,534,550 at the end of FY 2025. The purpose of the central reserves balance is to address immediate needs related to large unanticipated financial challenges or needs during a time of financial upheaval (bullets above). In the economic downturn years of FY 2009 – FY 2012, when the University's state appropriation was drastically reduced, the central reserves balance was accessed to aid the budget: it dropped to a range of \$10m-\$17 million below goal level for those years. During management of the financial realities of the pandemic in FY 2020 through FY 2022, central reserves again aided the budget, and the balance dropped to roughly \$20 million below goal level. With the recommendations in this budget and the projected investment returns for this year and next, the FY 2025 ending balance will be roughly \$88 million above the policy goal level.

The financial plan for FY 2025 central reserves is based on estimated resources derived primarily from investment earnings. Resources available for the year are projected to be \$171,234,517 which is an increase of \$57,900,038 from FY 2024.

Factors with a positive impact on the change in resources:

- The balance available from the previous year is estimated to be \$54,717,788 greater than that available in FY 2024: investment earnings above planned allocations were greater in FY 2023 than in FY 2022 and again in FY 2024 compared to FY 2023– representing a re-build coming out of the pandemic and allowing for continually stronger year-end balances than the previous year.
- Gross investment income and net realized capital gains are estimated to increase \$3,582,250 over FY 2024 primarily due to a projected growth in the Temporary Investment Pool (TIP) balance and continued favorable returns.

Factors with a negative impact on the change in resources:

- The fees and operating costs associated with managing the TIP funds and the required payment of interest to some project balances in TIP are estimated to increase by \$200,000 (decreasing total available resources).
- The required interest payments associated with federal grant balances is estimated to increase by \$200,000. As this is a payment from the fund, it will decrease total resources available for allocation.

The financial plan for FY 2025 central reserves should be viewed as two strategies: one for recurring allocations and one for nonrecurring allocations. In total, this recommended budget includes allocations of \$52,699,967, which is an increase of \$32,662,005 compared to FY 2024.

First, given the University's recent history requiring the use of Central Reserves to support the operating budget in the pandemic time of unanticipated revenue losses and the desire to manage the fund to provide similar assistance when needed in the future, this budget recommends only minor increases in the recurring allocations from the fund. The recent gains from investment are significant, but as the sharp growth trendline is short, the President recommends the majority of these gains be considered nonrecurring and not available to permanently provide operating support to academic and support units; not available to offset tuition rate increases. If the trend continues and there is confidence in the level of return recorded in the fund over the next several years, it may then be possible to increase the recurring transfer from central reserves to the O&M fund in a way that can offset potential tuition rate changes. In the meantime, this budget includes increasing the total recurring allocations of \$12,347,580 from the Central Reserves fund in FY 2024 to \$14,662,580 in FY 2025; an increase of \$2,315,000. By line item these recommended increases are the following:

- \$35,000 – a recurring allocation to the President's Office for the costs of institutional dues and memberships
- \$280,000 – a recurring allocation to the University of Minnesota Alumni Association to address compensation increases and general operating costs
- \$500,000 – a recurring allocation to the University of Minnesota Foundation to support a portion of increased costs for the development officers working with University colleges and campuses
- \$1,500,000 – a recurring allocation to begin to build a pool of funds (goal is \$3 million by FY 2030) that will allow for an on-going and robust reputational marketing campaign for the institution

Second, due to the size of the uncommitted available balance existing at the end of FY 2024 and anticipated for the end of FY 2025, this recommended budget includes significant increases in the nonrecurring allocations from the fund. In a year with no additional state appropriations and limited capacity to fund programmatic or service initiatives, the availability of this uncommitted balance allows for some one-time support. In addition, it provides an opportunity to address some significant financial challenges as a bridge to future revenue and expense adjustments and to eliminate some deficits faster than otherwise would have been possible. For FY 2025, the recommended nonrecurring allocations total \$38,037,387 and are indicated with asterisks on page two of Attachment 1.

As mentioned above, implementation of these recommendations will result in an estimated FY 2025 year-end balance in the fund of roughly \$119 million, which is \$88 million above the policy guideline. The carryforward from FY 2024, plus the annual revenues into the fund, recommended allocations out, and projected ending balance are summarized in the FY 2025 Central Reserves column on Attachment 10. University leadership believes it is prudent to leave the projected balance in the fund, to continue to earn interest on that unspent balance, and to consider it as a potential reserve available for nonrecurring support of financial challenges that could be on the near horizon. This plan should be assessed annually for the potential to increase the recurring allocations from the fund and a possible positive impact on future tuition rate increases.

2. Self-Sustaining Funds

Auxiliary Enterprises

The University includes several operations that provide goods and services predominantly to individuals in the University community and incidentally to the general public. Residence halls, food service, student unions, bookstores, parking and transit, health services, and intercollegiate athletics are primary examples of these activities referred to as auxiliary enterprises.

Overall, the FY 2025 budget for auxiliary revenues generated by these enterprises is an estimated \$457.0 million which is an estimated increase of approximately \$27.9 million (6.5%) over FY 2024. As has been explained in reports to the Board of Regents over the last several years, these units experienced the most significant negative financial impact due to the pandemic. Revenues dropped significantly from “normal” levels, and the units responded with expense reductions where possible the use of balances and reserves that were previously in place primarily to address facility-related needs, and isolating deficits in accounts to cover with future revenues. In addition, the University allocated some of the authorized central reserves balance, savings in central support units from the furlough/temporary pay reduction program, and some of the federal relief funds to offset losses in these units. As explained earlier in this document, this budget allocates a nonrecurring \$12.4 million from Central Reserves toward the accumulated and isolated deficits to reduce the burden on rates charged to students in the future. Moving forward, the expectation is that revenue-generating activities and occupancy rates in housing will continue to rebound and will cover any remaining shortfalls and growth in costs.

Internal Service Activities

The University conducts internal service activities for the purpose of convenience, cost, or control. These activities provide goods and services predominantly to University departments and indirectly to the general public. Fleet services, UMarket Services, and the Mechanical Engineering Shop are examples of internal service activities.

Overall, the FY 2025 budget for revenues generated by these internal service organizations is an estimated \$293.9 million, which is a projected increase of approximately \$11.3 million (4.0%) compared to FY 2024. Activity in many of these operations has grown steadily in the last year or more following the pandemic. Some are facing lower levels of demand, requiring expense reductions and changes in operations. Shortfalls in internal sales are addressed through reduced expenditures where possible, one-time subsidies from other funds, and future increases in rates charged to customers when possible.

Other Unrestricted and Other Restricted Non-Sponsored Activity

The FY 2025 budget for other unrestricted and restricted non-sponsored funds combined includes estimated resources of approximately \$1.4 billion, which is an increase of approximately \$56.2

million (4.2%) compared to FY 2024. Most of these sources are expected to increase 4.0% over FY 2024. As with the auxiliary and internal sales units, many of the activities generating income in this fund group were canceled or severely reduced over the last months of FY 2020 and throughout FY 2021. The response to shortfalls where they occurred was like that of other activities: a reduction in expenditures where possible, the use of balances and reserves, University support through central reserves/central unit savings, and the federal relief dollars. In the last two years, many activities have returned to pre-pandemic levels while others continue to grow more slowly over time. Restricted funding has since returned to pre-pandemic levels and is projected to follow normal growth trends (roughly 4% annually) moving forward.

The other unrestricted fund group within this category includes resources derived from miscellaneous activities such as sales of educational goods and services, clinical income, course and campus/collegiate fees, and student payment-related fees.

The other restricted fund group within this category includes grants and contracts with business and industry, gifts received through the University of Minnesota Foundation, endowment earnings, and restricted government appropriations, each of which can only be used in accordance with the purposes established by the source. As expected, every year, units will balance budgets in these funds with the projected growth in revenue and/or expense reductions.

3. Sponsored Research

Sponsored research consists of grants and contracts administered through the Office of Sponsored Project Administration (SPA). Sponsored funds typically represent multi-year activities surrounding research and public service projects. Estimated expenditures for a given year will vary according to the University's ability to obtain grants as well as the timing of expenditures related to current or pending projects. Estimated direct expenditures for FY 2025 are \$830,000,000.

VI. All Funds Budget – Expenditures/Allocations

For FY 2023, the most recent year of actual resource and expenditure information, current fund expenditures for University operations totaled approximately \$4.5 billion. Attachment 5 contains the definitions of all current non-sponsored and sponsored funds. Table 5 below outlines (according to function) the current fund expenditures for FY 2023, updated estimates of these expenditures for FY 2024, and the proposed budget for FY 2025. Note that the table includes only recorded expenditures and not transfers from the current funds to noncurrent funds, primarily to the plant fund for debt service and capital projects. The full set of expenditures and transfers are detailed in Attachment 10: University Fiscal Page.

Table 5
Current Fund Expenditures

<u>Functional Category</u>	<u>FY2022-23 Actual Expenditures</u>	<u>FY2023-24 Estimated</u>	<u>FY2024-25 Proposed Budget</u>	<u>FY25 % of Total</u>
Instruction	\$886,782,935	\$922,684,357	\$951,174,979	19.5%
Research	399,932,151	416,123,411	428,972,458	8.8%
Public Service	229,626,368	238,922,795	246,300,247	5.1%
Academic Support	640,013,564	665,924,524	686,486,923	14.1%
Student Services	161,303,530	167,833,906	173,016,277	3.6%
Institutional Support	320,138,445	333,099,255	343,384,685	7.0%
Plant/Ops & Maintenance	358,207,483	372,709,518	384,218,033	7.9%
Scholarships/Fellowships	377,378,529	413,676,738	419,881,889	8.6%
Auxiliary Enterprises	<u>381,952,490</u>	<u>397,415,842</u>	<u>409,687,238</u>	<u>8.4%</u>
	\$3,755,335,494	\$3,928,390,347	\$4,043,122,728	83.0%
Subtotal Sponsored (direct)	\$772,939,854	\$790,000,000	\$830,000,000	17.0%
Total Expenditures	\$4,528,275,348	\$4,718,390,347	\$4,873,122,728	100.0%
Transfers to the Plant Fund	\$133,796,260	\$135,000,000	\$140,000,000	
Total Expenditures and Transfers	\$4,662,071,608	\$4,853,390,346	\$5,013,122,728	

Within the President's Recommended Annual Operating Budget, non-sponsored funds represent 83.0% of all current fund expenditures. The growth in the non-sponsored fund expenditures is projected to be 2.9%, spread across all function categories. The sponsored fund expenditures are expected to increase 5.1% based on units projected net change in awards. The total all-funds growth in expenditures over the prior year is then 3.3% and is driven by the following cost increases:

- the 4.0% (non-faculty labor represented) and proposed 3% (all other employee groups) increase in salaries plus associated fringe benefit costs,
- inflation on utilities, supplies/library materials/equipment, etc., offset by unit-level decisions to buy less or buy differently than they otherwise would to avoid some of the impacts from inflation. Most major cost categories outside of compensation are expected to increase 3.0%-3.5% for FY 2025.
- The 5.1% projected increase in sponsored fund spending based on known and projected growth in awards.

Specific investments in the strategic plan or other initiatives as proposed in the budget and planned by units will lead to increased expenditures. Those spending increases will be spread throughout functions and will not be evident in any significant line-item increase because they are offset in large part by the planned spending reductions in units as described earlier in this document.

Centrally Distributed and Attributed – Proposed Distributions

Within the context of available resources, the proposed distributions for the centrally distributed and attributed funds are as follows:

Table 6
FY 2025 Proposed Distributions
Centrally Distributed and Attributed Funds

	<u>O&M</u>	<u>Tuition</u>	<u>State Specials</u>	<u>ICR</u>	<u>Central Reserves</u>
Balance Forward	\$1,971,419	\$0	\$0	\$0	\$93,296,517
Annual Revenue/ Net Transfers	<u>\$715,258,000</u>	<u>\$1,026,526,660</u>	<u>\$94,845,000</u>	<u>\$236,990,918</u>	<u>\$77,938,000</u>
Total Net Resources	\$717,229,419	\$1,026,526,660	\$94,845,000	\$236,990,918	\$171,234,517
Planned Distributions	<u>\$716,364,090</u>	<u>\$1,026,526,660</u>	<u>\$94,845,000</u>	<u>\$236,990,918</u>	<u>\$52,699,967</u>
Ending Balance	\$865,329	\$0	\$0	\$0	\$118,534,550

Details on specific distributions by campus, college, and support unit can be found in Attachment 10, Fund Forecast – Centrally Distributed and Attributed Funds. Distributions represent resources provided to the operating units (primarily academic) as part of the FY 2025 budget plan. Units will utilize those resources to cover costs as projected and explained in this budget, with any funds remaining at the end of the year held as a reserve for future planned spending. The “Ending Balance” in the table above represents funds held by the institution and not planned for distribution to the operating units.

VII. Conclusion – FY 2025 Recommended Annual Operating Budget

The FY 2025 Annual Operating Budget for the University of Minnesota, recommended by Interim President Ettinger and senior leaders of the University, represents a balanced and responsible approach to maintaining excellence at a top-tier, public research University. The plan includes recurring funds held as uncommitted in the FY 2024 budget and substantial reallocated resources along with additional funds for students to make a modest investment in compensation for the University’s employees, to address core needs in many University units, including the recurring negative financial impacts of reduced enrollment in some units, to expand and enhance only the most critical services, and to maintain the most critical physical infrastructure items across the University.

VIII. All Current Funds Operating Budget – Resolution

The docket contains the budget resolution for approval by the Board of Regents.

**Attachment 1
FY 2025 Recommended Incremental Investments - Revised**

	A		B
	FY25 Incremental		FY25 Incremental
	Investment		Investment
Recurring Categories and Items			
1 <u>Facilities and Technology Infrastructure</u>		<u>Program Enhancement</u>	
2 Software Licenses/Maintenance	2,368,326	Security Infrastructure Manager	175,000
3 Utilities, New Building Operations, Debt, Leases	6,688,493	Sexual Misconduct Prevention Program	348,000
4 Subtotal Infratsructure	9,056,819	Legacy Data Warehouse Modernization	1,478,000
5		Recruitment - EAB Contract/Counselor	191,483
6 <u>Core Operations and Services</u>		IACUC Enhancements	263,000
7 Library Collections/Software	582,500	Export Controls Position	89,000
8 Trades Compensation Differential-FM TC	274,000	Research Integrity Officer/Contracts	50,000
9 Waste Control-Stericycle Contract	25,000	Classroom Maintenance	600,000
10 Athletic Compliance (OGC Position)	75,000	Marketing/Communications Staff Expansion	1,000,000
11 Enterprise Risk Manager	191,500	Government Relations Team - Phase I	745,000
12 Equity & Diversity Senior Admin. Officer	235,195	Aacademic Unit Discretion-Student & Program Needs	12,502,066
13 Paralegal-Contract Management	115,000	Subtotal Strategic Plan	17,441,549
14 HR Lead for Office of Human Resources	85,000		
15 Recruiter - Health Science Positions	110,000	<u>Institutionally Managed Student Aid</u>	
16 Academic Support Resources - Business Analysts	242,000	President's Matching Scholarship Program	668,000
17 \$20/Hr Minimum Pay (state/tuition funds)	188,000	Subtotal Student Aid	668,000
18 Tuition Discounting/Scholshps-Technical Adj	4,901,632		
19 Operating Budget Support - Multiple Units	12,323,144	<u>FY24 Tuition -Actual to Budget Variance</u>	
20 Subtotal - General Operations	19,347,971	Address Revenue Shortfall - Multiple Units	16,437,401
21		Subtotal Tuition Variance	16,437,401
22			
23		TOTAL Non-Compensation Investments	62,951,740

Note: In addition to above, anticipating increased student aid expenditures through the American Indian Scholars Program transfer from the Office of Higher Education.

Recurring - funded by a combination of O&M allocation, tuition revenue and internal reallocation.

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Attachment 1
FY 2025 Recommended Incremental Investments - Revised

32 **Nonrecurring Items**

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34 **Facilities and Technology Infrastructure**

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36	All-Gender Restrooms	250,000
37	Classroom Renovation	450,000
38	Elevator/Fire Alarm/Pests-Contract Inflation	530,000
39	W. Central Rsrch/Outreach Center Feedlot	500,000 *
40	AAALAC Required Repairs-Research Infrastructure	1,300,000 *
41		3,030,000

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43 **Core Operations and Services**

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45	BSL-2/3 Maintenance Shutdown	530,000
46	EAB - Additional Names for Admissions/Recruiting	121,000
47	Last Mile Delivery	31,000
48	Last Mile Delivery	185,000
49	Equity & Diversity Education Program	292,825
50	RAR Operations	1,000,000
51	AVP Enrollment Management Office Set Up	500,000
52	Housing/Dining Pandemic Driven Deficits	12,400,000 *
53	Structural Imbalance Bridging Funds (CSOM and UMD)	6,000,000 *
54	Litigation Costs	9,277,387 *
55		30,337,212

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Program Enhancement/Support/Compliance

American Indian/Indiginous Studies PhD Program	200,000
Heritage Studies/Public History Program	174,000
Juneteenth	154,500
Consortium on Law and Values	45,500
Faculty Research Engagement Fund	150,000
International Student Services Programming	350,000
E-Sports Start-up Funds - University of MN Crookston	350,000
Information Technology - Intermediate Staffing	3,400,000
Student Financial Support	1,400,000
College of Biological Sciences Undergrad Program Coordinator	210,000 *
College of Design Workstation Upgrades	500,000 *
Campus Specific Enrollment Marketing	1,200,000 *
University of MN Crookston-On-Line Mental Health Services	150,000 *
Athletics One-Time Scholarship Support	1,500,000 *
President Cunningham Strategic Investment Pool (NR)	5,000,000 *
	14,784,000

TOTAL INVESTMENTS	48,151,212
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Sources:

Central Reserves (Balance over Guideline)	38,037,387 *
Enterprise System Assessment Balance	3,400,000
Forecast O&M Carry-Forward/Balance in Central Accounts	4,357,825
Targeted Support from UMF for the Strategic Plan	2,356,000

TOTAL SOURCES	48,151,212
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Attachment 2
Resource and Expenditure Budget Plan - University Fiscal Page - Revised

University of Minnesota

SUMMARY: Current Funds
plus Multi-Year/Sponsored Funds

	Actual FY21	Actual FY22	Actual FY23	Estimated FY24	Budget Plan FY25
RESOURCES					
a Carry Forward	\$1,110,880,235	\$1,412,372,773	\$1,523,150,641	\$1,574,944,214	\$1,640,051,972
Revenue Current Funds (By Fund)					
State Appropriation	\$602,818,000	\$621,968,000	\$621,968,000	\$686,558,000	\$676,294,000
Tuition	\$1,005,305,707	\$1,015,281,066	\$1,025,125,136	\$1,044,306,142	\$1,086,526,660
State Special	\$94,160,591	\$106,040,970	\$94,386,684	\$106,138,000	\$103,445,000
Sales, Fees, and Misc	\$394,591,293	\$398,877,320	\$428,570,855	\$453,561,847	\$471,704,321
Indirect Cost Recovery	\$178,378,564	\$195,588,690	\$222,154,133	\$236,362,696	\$236,990,918
Auxiliary Enterprises	\$245,874,878	\$403,804,506	\$416,754,661	\$429,257,301	\$457,159,026
Internal Sales	\$295,000,941	\$246,186,739	\$264,255,442	\$282,555,620	\$293,857,845
Private Practice	\$142,895,000	\$129,926,225	\$154,255,127	\$158,882,781	\$165,238,092
Federal Appropriations	\$24,880,390	\$14,633,948	\$15,646,478	\$18,322,333	\$19,800,000
Gifts & Endowment Income	\$262,444,685	\$285,294,629	\$338,569,119	\$342,536,501	\$357,950,644
Restricted Grants, Contracts & Misc	\$331,591,178	\$389,904,715	\$359,239,692	\$370,016,883	\$384,817,558
b Total Nonsponsored Revenues	\$3,577,941,227	\$3,807,506,807	\$3,940,925,327	\$4,128,498,104	\$4,253,784,063
c Resources Expended MY/Sponsored Funds	\$682,091,278	\$722,255,534	\$772,939,854	\$790,000,000	\$830,000,000
d Total Annual Revenues - Current Funds (b+c)	\$4,260,032,505	\$4,529,762,341	\$4,713,865,181	\$4,918,498,104	\$5,083,784,063
e Total Resources All Current Funds (a+d)	\$5,370,912,740	\$5,942,135,114	\$6,237,015,822	\$6,493,442,318	\$6,723,836,035
EXPENDITURES					
Expenditures by Function - Nonsponsored Only					
Instruction	\$816,756,633	\$829,336,689	\$886,782,935	\$922,684,357	\$951,174,979
Research	\$394,660,372	\$378,115,818	\$399,932,151	\$416,123,411	\$428,972,458
Public Service	\$190,043,192	\$210,285,886	\$229,626,368	\$238,922,795	\$246,300,247
Academic Support	\$518,457,765	\$571,621,256	\$640,013,564	\$665,924,524	\$686,486,923
Student Services	\$132,867,423	\$143,008,221	\$161,303,530	\$167,833,906	\$173,016,277
Institutional Support	\$160,260,986	\$339,144,007	\$320,138,445	\$333,099,255	\$343,384,685
Operations & Maintenance of Plant	\$336,752,280	\$339,270,400	\$358,207,483	\$372,709,518	\$384,218,033
Scholarships & Fellowships	\$368,582,408	\$403,923,758	\$377,378,529	\$413,676,738	\$421,281,889
Auxiliary Enterprises	\$267,270,317	\$375,056,468	\$381,952,490	\$397,415,842	\$409,687,238
f Total Nonsponsored Expenditures	\$3,185,651,376	\$3,589,762,502	\$3,755,335,494	\$3,928,390,347	\$4,044,522,728
g Expenditures MY/Sponsored Funds	\$682,091,278	\$722,255,534	\$772,939,854	\$790,000,000	\$830,000,000
h Total Expenditures (f+g)	\$3,867,742,654	\$4,312,018,035	\$4,528,275,348	\$4,718,390,347	\$4,874,522,728
Expenditures by Natural Classification - Nonsponsored Only					
Salaries	\$1,485,650,509	\$1,543,841,066	\$1,663,386,061	\$1,767,347,690	\$1,835,390,576
Fringe Benefits	\$512,869,560	\$540,706,076	\$567,788,547	\$618,571,692	\$624,032,796
Student Aid	\$375,741,088	\$426,436,488	\$401,500,813	\$413,676,738	\$421,281,889
Supplies, Services, Miscellaneous	\$372,841,057	\$405,144,897	\$465,366,053	\$483,980,695	\$500,920,019
Consulting & Professional Services	\$109,744,356	\$123,370,152	\$111,064,365	\$94,557,168	\$97,866,669
Materials for Resale	\$39,596,290	\$61,168,694	\$62,271,926	\$67,866,192	\$70,241,509
Capital Assets/Equipment	\$58,727,509	\$78,330,932	\$55,918,084	\$57,437,516	\$59,447,829
Noncapital Equipment	\$43,045,091	\$47,886,396	\$50,944,145	\$49,160,229	\$50,880,837
Rents & Leases	\$33,855,861	\$40,410,489	\$41,797,282	\$43,062,527	\$44,569,715
Repairs, Maintenance, Supplies	\$57,064,427	\$65,150,006	\$81,175,057	\$73,280,518	\$75,845,336
ICR, Subcontracts, Participant Expense	\$855,929	\$1,235,785	\$1,594,446	\$1,441,330	\$1,445,161
Other Expenses & Adjustments	(\$53,735,012)	\$79,023,574	\$70,094,742	\$70,574,078	\$70,000,000
University Assessments	(\$1,302)	(\$0)	\$0	\$0	\$0
Utilities	\$149,696,014	\$177,057,946	\$182,433,974	\$187,433,974	\$192,600,391
i Total Nonsponsored Expenditures	\$3,185,651,376	\$3,589,762,502	\$3,755,335,494	\$3,928,390,347	\$4,044,522,728
j Expenditures MY/Sponsored Funds	\$682,091,278	\$722,255,534	\$772,939,854	\$790,000,000	\$830,000,000
k Total Expenditures (i+j)	\$3,867,742,654	\$4,312,018,035	\$4,528,275,348	\$4,718,390,347	\$4,874,522,728
TRANSFERS & ADJUSTMENTS					
l Transfers	(\$90,797,312)	(\$106,966,438)	(\$133,796,260)	(\$135,000,000)	(\$140,000,000)
ENDING BALANCE (e+k+l)	\$1,412,372,773	\$1,523,150,641	\$1,574,944,214	\$1,640,051,972	\$1,709,313,307

**Attachment 3
Supplemental Information: Changes in the State Appropriations**

University of Minnesota

Incremental Appropriation Changes for the 2024-2025 Biennium – Request and Final

	Request	Final Bill	% of	Request	Final Bill	% of
Recurring	FY24	FY24	Request	FY25 Over FY24	FY25 Over FY24	Request
Core Mission	45,000,000	50,000,000		45,000,000	0	
MN Resident Scholarship	30,000,000	0		0	0	
Safety & Security	5,000,000	1,000,000		0	0	
American Indian Scholars	4,500,000	4,032,000 *		0	0	
Tuition Shortfall	24,000,000	0		0	0	
Tuition Freeze	13,500,000	0		13,500,000	0	
Unemployment Insurance Aid	0	366,000		0	0	
Menstrual Products	0	110,000		0	0	
Total Recurring	122,000,000	55,508,000	45%	58,500,000	0	0%
Nonrecurring						
Safety & Security	0	4,000,000		0	4,000,000	
General O&M - Undesignated	0	0		0	0	
Menstrual Products	0	264,000		0	0	
NRRI	0	2,000,000		0	2,000,000	
Total Nonrecurring	0	6,264,000		0	6,000,000	
Total Recurring & Nonrecurring	122,000,000	61,772,000	51%	58,500,000	6,000,000	10%
*(Appropriated to Office of Higher Education for transfer to the University)						

Summary of State Support Outside of the Higher Education Bill

The State of Minnesota’s FY 2024-25 biennial budget also provided funding to the University of Minnesota outside of the Higher Education bill (2023 Session Law, Chapter 41). This additional funding is made available through several different mechanisms and is for specific purposes outlined in session law or state statute. Note: this funding is not available for general operations of the University such as compensation increases or facility costs. It is highly restricted to particular initiatives or units and is most often nonrecurring. Examples follow.

Direct Appropriations to the Board of Regents – It is common for the Board of Regents to receive additional direct appropriations from the State of Minnesota in bills other than the Higher

Education bill. The amount provided for each biennium can vary significantly based on the policy issues addressed by the legislature in each session. Illustrative examples of appropriations provided in the FY 2024-25 biennium include:

- A nonrecurring appropriation in FY 2025 for \$1,372,000 for the Family and Medical Benefit Insurance Program (Laws 2023, Chapter 59, Article 3, Section 10).
- Nonrecurring appropriations of \$2,500,000 in FY 2024 and FY 2025 for small community partnerships to conduct infrastructure project analysis and development (Laws 2023, Ch. 68, Article 1, Sec. 15).
- A recurring appropriation, starting in FY 2024, for \$1,000,000 for Minnesota Extension to assist the agricultural sector, land and resource managers, and communities to help them plan for and adapt to weather extremes (Laws 2023, Ch. 60, Article 10, Sec. 7).
- Nonrecurring appropriations from the Environment and Natural Resource Trust Fund (ENRTF), such as those included in Laws 2023, Ch. 60, Article 2, are oftentimes provided in the first year of the biennium (e.g. FY 2024), but some of these appropriations are available for several years. An example of this is the \$754,000 appropriated to the University for quantifying the environmental benefits of peatland restoration in Minnesota, which is available until June 30, 2027.

Direct appropriations to a state agency for a grant or contract with the University of Minnesota – This is another relatively common form of state funding for the University. These state-funded grants and contracts function like other nonsponsored and sponsored grants and contracts, typically with an end date that may or may not fall outside of the year the appropriation was provided and require a formal agreement with the state agency administering the grant or contract. Illustrative examples include:

- A nonrecurring appropriation to the Minnesota Department of Agriculture for \$3,000,000 in FY 2024 and an additional \$3,000,000 in FY 2025 for a grant to the University of Minnesota for the Forever Green agriculture initiative. This appropriation is available over several years – June 30, 2028 (Laws 2023, Chapter 40, Article 2, Sec. 3).
- A nonrecurring appropriation to the Department of Administration for \$690,000 in FY 2024 for a contract with the University of Minnesota for the Institute on the Environment to research and provide recommendations to establish new energy guidelines for state buildings (Laws 2023, Chapter 60, Article 10, Sec. 8).
- A nonrecurring appropriation of \$4,200,000 to the Department of Education for a contract with the Center for Applied Research and Educational Improvement at the University of Minnesota for implementing the READ Act (Laws 2023, Article 3, Chapter 55, Sec. 11). This appropriation is available until June 30, 2026.

It is important to note that, beginning in FY 2024, state agencies were allowed to deduct up to 5% from all new grants/grant programs to fund their grant administration expenses unless funds were otherwise appropriated for administrative costs. These provisions were included in Laws 2023, Chapter 62, Article 2, Sec. 10) and are specific to grant programs – these administrative costs do not pertain to direct appropriations, contracts, or transfers.

Direct appropriations to state agencies for transfer to the University of Minnesota – Although less common, appropriations are sometimes provided to a state agency for transfer to the University of Minnesota. This funding functions much like a direct appropriation to the University but has the additional required step of a transfer.

- Nonrecurring appropriations in FY 2024 and FY 2025 to the Minnesota Department of Agriculture for transfer to the University of Minnesota to evaluate propagate and maintain the genetic diversity of plants (Laws 2023, Ch. 43, Article 1, Sec. 2.)
- Recurring appropriations to the Department of Agriculture for transfer to the University for the Agriculture Research, Education, Extension, and Technology Transfer Program (AGREETT) in Chapter 43, Article 1, Sec. 2, Subd 4. The program is outlined in Minnesota Statutes 41A.14.

Appropriations in state statute – There are several appropriations outlined in Minnesota state statute for the University of Minnesota. These appropriations are ongoing unless there is an amendment to the statute. Oftentimes, appropriations that are included in state statutes are connected to a specific program or formula, but there are times in which an amount is specified. Illustrative examples include:

- Funding provided through MS 477A.0126 for the Tribal and Training Certification partnership in the College of Education and Human Service Professions at the University of Minnesota Duluth. The aid payable each year is based on a county aid formula; a specific amount is not specified.
- Funding provided through MS 517.08 from the civil marriage license fee for the Couples on the Brink Project, as described under MS 137.32. Of the \$115 full fee for couples who elect not to participate in premarital education, the University receives \$5.

Attachment 4: University of Minnesota 2024-2025 Tuition Rate Plan - Revised

	C 2023-2024 Semester Rates		D 2024-2025 Semester Rates		E	F
	Resident	Nonresident	Resident	Nonresident	Resident % Change	Nonresident % Change
Rates listed as Year 2 (or beyond) show the percentage change for an individual student by comparing the FY24 rate the student is currently charged to the proposed FY25 rate. For example, the rate for a 4th Year Student (fall 2021 start) in the School of Dentistry DDS Program reflects the rate that student paid as a 3rd year student as their 2023-2024 rate (adjusted in columns A & B) and the rate they will pay as a 4th year student for 2024-2025.						
Twin Cities						
Undergraduate						
Per Credit	\$557.55	\$1,323.50	\$582.65	\$1,396.00	4.5%	5.5%
13 Credits or more	\$7,248.00	\$17,205.00	\$7,574.00	\$18,148.00	4.5%	5.5%
Carlson School of Management tuition surcharge (paid in addition to rates above; Fall, Spring & Summer)						
Per Credit (1-8 credits)	\$130.00	\$130.00	\$136.00	\$136.00	4.6%	4.6%
9 Credits or more (full-time)	\$1,300.00	\$1,300.00	\$1,360.00	\$1,360.00	4.6%	4.6%
College of Science and Engineering tuition surcharge Students first enrolled at the University of Minnesota in fall 2019 or later. Applies to all CSE students and non-CSE students in the semester after they are admitted to a CSE major. (paid in addition to rates above; Fall, Spring & Summer)						
Per Credit (1-8 credits)	\$130.00	\$130.00	\$136.00	\$136.00	4.6%	4.6%
9 Credits or more (full-time)	\$1,300.00	\$1,300.00	\$1,360.00	\$1,360.00	4.6%	4.6%
Graduate School General Programs						
Per Credit	\$1,593.00	\$2,465.00	\$1,665.00	\$2,601.00	4.5%	5.5%
6-14 Credits	\$9,558.00	\$14,790.00	\$9,990.00	\$15,606.00	4.5%	5.5%
Each Credit over 14	\$1,593.00	\$2,465.00	\$1,665.00	\$2,601.00	4.5%	5.5%
College specific post-baccalaureate programs						
College of Education and Human Development						
Masters in Education & Post-baccalaureate Certificate Programs						
Per Credit	\$796.00	\$1,232.00	\$832.00	\$1,300.00	4.5%	5.5%
12 - 24 Credits	\$9,552.00	\$14,784.00	\$9,984.00	\$15,600.00	4.5%	5.5%
Each Credit over 24	\$796.00	\$1,232.00	\$832.00	\$1,300.00	4.5%	5.5%
Masters in Education & Post-baccalaureate Certificate Programs - Non-Degree, Nonresident, Summer Only						
Per Credit		\$796.00		\$832.00		4.5%
12 - 24 Credits		\$9,552.00		\$9,984.00		4.5%
Each Credit over 24		\$796.00		\$832.00		4.5%
Master of Learning and Talent Development						
Per Credit	\$920.00	\$920.00	\$961.00	\$961.00	4.5%	4.5%
Master of Social Work						
Per Credit	\$796.00	\$796.00	\$832.00	\$832.00	4.5%	4.5%
College of Food, Agriculture & Natural Resource Sciences						
Master of Science in Agricultural Education						
Per Credit	\$839.00	\$1,232.00	\$877.00	\$1,287.00	4.5%	4.5%
12-24 Credits	\$10,068.00	\$14,784.00	\$10,524.00	\$15,444.00	4.5%	4.5%
Each Credit over 24	\$839.00	\$1,232.00	\$877.00	\$1,287.00	4.5%	4.5%
College of Liberal Arts						
Master of Geographic Information Science						
Per Credit	\$1,658.00	\$2,570.00	\$1,733.00	\$2,711.00	4.5%	5.5%
6-14 Credits	\$9,948.00	\$15,420.00	\$10,398.00	\$16,266.00	4.5%	5.5%
Each Credit over 14	\$1,658.00	\$2,570.00	\$1,733.00	\$2,711.00	4.5%	5.5%
Doctorate in Audiology						
Per Credit	\$1,738.00	\$2,661.00	\$1,816.00	\$2,807.00	4.5%	5.5%
6-14 Credits	\$10,428.00	\$15,966.00	\$10,896.00	\$16,842.00	4.5%	5.5%
Each Credit over 14	\$1,738.00	\$2,661.00	\$1,816.00	\$2,807.00	4.5%	5.5%
Masters in Speech-Language Pathology						
Per Credit	\$1,738.00	\$2,661.00	\$1,816.00	\$2,807.00	4.5%	5.5%
6-14 Credits	\$10,428.00	\$15,966.00	\$10,896.00	\$16,842.00	4.5%	5.5%
Each Credit over 14	\$1,738.00	\$2,661.00	\$1,816.00	\$2,807.00	4.5%	5.5%
Post-Baccalaureate Certificate in Technical Communication						
Per Credit	\$817.00	\$1,249.00	\$817.00	\$817.00	0.0%	-34.6%
Post-Baccalaureate Certificate of Teacher Licensure in Music Education						
Per Credit	\$796.00	\$1,232.00	\$832.00	\$1,300.00	4.5%	5.5%
12 - 24 Credits	\$9,552.00	\$14,784.00	\$9,984.00	\$15,600.00	4.5%	5.5%
Each Credit over 24	\$796.00	\$1,232.00	\$832.00	\$1,300.00	4.5%	5.5%

Attachment 4: University of Minnesota 2024-2025 Tuition Rate Plan - Revised

	C		D		E		F	
	2023-2024		2024-2025		2024-2025		2024-2025	
	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident
College of Continuing and Professional Studies								
Departmental Master								
Per Credit	\$900.00	\$900.00	\$900.00	\$900.00	0.0%	0.0%		
12 Credits or more	\$10,800.00	\$10,800.00	\$10,800.00	\$10,800.00	0.0%	0.0%		
Human Sexuality Certificate								
Per Credit	\$900.00	\$900.00	\$900.00	\$900.00	0.0%	0.0%		
Transgender and Gender Diverse Health Certificate								
Sex Therapy Certificate								
Per Credit	\$900.00	\$900.00	\$900.00	\$900.00	0.0%	0.0%		
Leadership for Sciences Professional Certificate								
Per Credit	\$1,400.00	\$1,400.00	\$1,400.00	\$1,400.00	0.0%	0.0%		
Regulatory Affairs for Food Professionals Certificate								
Per Credit	\$1,400.00	\$1,400.00	\$1,400.00	\$1,400.00	0.0%	0.0%		
Master of Professional Studies in Horticulture								
Per Credit	\$900.00	\$900.00	\$900.00	\$900.00	0.0%	0.0%		
12 Credits or more	\$10,800.00	\$10,800.00	\$10,800.00	\$10,800.00	0.0%	0.0%		
Master of Professional Studies in Addictions Counseling - Part Time								
Per Credit	\$850.00	\$850.00	\$850.00	\$850.00	0.0%	0.0%		
12 Credits or more	\$10,200.00	\$10,200.00	\$10,200.00	\$10,200.00	0.0%	0.0%		
Master of Professional Studies in Addictions Counseling - Full Time								
Fall & Spring - Year 1 flat rate	\$5,500.00	\$5,500.00	\$7,200.00	\$7,200.00	30.9%	30.9%		
Summer - Year 1 flat rate	\$5,000.00	\$5,000.00	\$4,600.00	\$4,600.00	-8.0%	-8.0%		
Fall & Spring - Year 2 flat rate	\$4,000.00	\$4,000.00	\$2,500.00	\$2,500.00	-37.5%	-37.5%		
Master of Professional Studies in Arts and Cultural Leadership								
Per Credit	\$900.00	\$900.00	\$900.00	\$900.00	0.0%	0.0%		
12 Credits or more	\$10,800.00	\$10,800.00	\$10,800.00	\$10,800.00	0.0%	0.0%		
Master of Professional Studies in Integrated Behavioral Health								
Per Credit	\$850.00	\$850.00	\$850.00	\$850.00	0.0%	0.0%		
12 Credits or more	\$10,200.00	\$10,200.00	\$10,200.00	\$10,200.00	0.0%	0.0%		
Master of Biological Sciences								
Per Credit	\$1,400.00	\$1,400.00	\$1,400.00	\$1,400.00	0.0%	0.0%		
10 Credits or more	\$14,000.00	\$14,000.00	\$14,000.00	\$14,000.00	0.0%	0.0%		
Master of Professional Studies in Applied Sciences Leadership								
Per Credit	\$1,400.00	\$1,400.00	\$1,400.00	\$1,400.00	0.0%	0.0%		
10 Credits or more	\$14,000.00	\$14,000.00	\$14,000.00	\$14,000.00	0.0%	0.0%		
College of Science and Engineering								
Master of Financial Mathematics & Fund of Quant Finance Certificate								
Per Credit - Year 1 and post-2nd year	\$1,167.00	\$1,461.00	\$1,202.00	\$1,505.00	3.0%	3.0%		
Per Credit - Year 2	\$1,167.00	\$1,461.00	\$1,167.00	\$1,461.00	0.0%	0.0%		
Master of Science in Management of Technology								
Per Credit - Year 1	\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00	0.0%	0.0%		
Per Credit - Year 2	\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00	0.0%	0.0%		
Master of Science in Security Technologies								
Per Credit	\$1,350.00	\$1,350.00	\$1,400.00	\$1,400.00	3.7%	3.7%		
Master of Science in Medical Device Innovation								
Per Credit	\$1,350.00	\$1,350.00	\$1,400.00	\$1,400.00	3.7%	3.7%		
Master of Science in Data Science								
Data Science Post-Baccalaureate Certificate								
Per Credit	\$850.00	\$1,315.00	\$850.00	\$1,315.00	0.0%	0.0%		
Electrification Engineering Graduate Certificate								
Technology Leadership Graduate Certificate								
Per Credit	\$1,350.00	\$1,350.00	\$1,400.00	\$1,400.00	3.7%	3.7%		

Attachment 4:
University of Minnesota 2024-2025
Tuition Rate Plan - Revised

	C		D		E		F	
	2023-2024		2024-2025		2024-2025		2024-2025	
	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident
College of Design								
Masters of Architecture								
Per Credit	\$1,228.00	\$1,228.00	\$1,283.00	\$1,283.00	4.5%		4.5%	
12-17 Credits	\$14,736.00	\$14,736.00	\$15,396.00	\$15,396.00	4.5%		4.5%	
Each Credit over 17	\$1,228.000	\$1,228.000	\$1,283.000	\$1,283.000	4.5%		4.5%	
Masters of Landscape Architecture								
Per Credit	\$1,112.00	\$1,228.00	\$1,162.00	\$1,283.00	4.5%		4.5%	
12-17 Credits	\$13,344.00	\$14,736.00	\$13,944.00	\$15,396.00	4.5%		4.5%	
Each Credit over 17	\$1,112.00	\$1,228.000	\$1,162.00	\$1,283.000	4.5%		4.5%	
Humphrey School of Public Affairs								
Master of Public Policy (MPP)								
Master of Urban and Regional Planning (MURP)								
Master of Science in Science, Technology and Environmental Policy (MS-STEP)								
Master of Human Rights (MHR)								
Per Credit	\$1,815.00	\$2,647.00	\$1,897.00	\$2,793.00	4.5%		5.5%	
6-15 Credits	\$10,890.00	\$15,882.00	\$11,382.00	\$16,758.00	4.5%		5.5%	
Each Credit over 15	\$1,815.00	\$2,647.00	\$1,897.00	\$2,793.00	4.5%		5.5%	
Master of Development Practice								
Per Credit	\$1,815.00	\$2,647.00	\$1,897.00	\$2,793.00	4.5%		5.5%	
6-16 Credits	\$10,890.00	\$15,882.00	\$11,382.00	\$16,758.00	4.5%		5.5%	
Each Credit over 16	\$1,815.00	\$2,647.00	\$1,897.00	\$2,793.00	4.5%		5.5%	
Master of Public Affairs								
Certificate Programs:								
Executive Leadership (Post-Baccalaureate)								
Public Affairs Leadership								
Policy Issues on Work and Pay								
Early Childhood Policy								
Human Services Leadership								
Per Credit	\$1,532.00	\$2,406.00	\$1,601.00	\$2,539.00	4.5%		5.5%	
Master of Public Affairs - Non-Degree, Nonresident, Summer Only								
Per Credit		\$1,532.00		\$1,601.00			4.5%	
Sustainable Environmental, Social and Governance Leadership								
Per Credit			\$1,601.00	\$1,601.00		new		new
Nonprofit Management								
Per Credit	\$1,294.00	\$1,868.00	\$1,352.00	\$1,971.00	4.5%		5.5%	
10-15 Credits	\$12,940.00	\$18,680.00	\$13,520.00	\$19,710.00	4.5%		5.5%	
Each Credit over 15	\$1,294.00	\$1,868.00	\$1,352.00	\$1,971.00	4.5%		5.5%	
Election Administration Certificate								
Per Credit	\$1,059.00	\$1,295.00	\$1,107.00	\$1,366.00	4.5%		5.5%	
Law School								
Fall & Spring - 1 L, 2 L, and 3 L								
Per Credit	\$1,944.00	\$2,337.00	\$2,022.00	\$2,431.00	4.0%		4.0%	
12 Credits or more (Term)	\$23,328.00	\$28,044.00	\$24,264.00	\$29,172.00	4.0%		4.0%	
Summer - 1 L, 2 L, and 3 L								
Per Credit	\$1,944.00	\$2,337.00	\$2,022.00	\$2,431.00	4.0%		4.0%	
LLM								
Per semester		\$28,896.00		\$30,052.00			4.0%	
Program Completion/special circumstances (Per Credit)		\$2,408.00		\$2,504.00			4.0%	
Master of Science in Patent Law								
Per Credit	\$1,666.00	\$2,003.00	\$1,733.00	\$2,083.00	4.0%		4.0%	
14 Credits or more (Term)	\$23,324.00	\$28,042.00	\$24,262.00	\$29,162.00	4.0%		4.0%	

Attachment 4: University of Minnesota 2024-2025 Tuition Rate Plan - Revised

	C		D		E		F	
	2023-2024		2024-2025		2024-2025		2024-2025	
	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident
Carlson School of Management								
Master in Human Resources and Industrial Relations (MHRIR) - Full-Time Program								
Per Credit	\$1,146.00	\$1,901.00	\$1,200.00	\$2,010.00	4.7%	5.7%		
10-16 Credits	\$11,460.00	\$19,010.00	\$12,000.00	\$20,100.00	4.7%	5.7%		
Each Credit over 16	\$1,146.00	\$1,901.00	\$1,200.00	\$2,010.00	4.7%	5.7%		
Master in Human Resources and Industrial Relations (MAHRIR) - Part-Time Program								
Per Credit	\$1,159.00	\$1,159.00	\$1,210.00	\$1,210.00	4.4%	4.4%		
MBA Full-Time Program - Entering (1st year) Students (guaranteed two-year rates)								
Per Credit	\$1,820.00	\$2,330.00	\$1,900.00	\$2,460.00	4.4%	5.6%		
12-20 Credits	\$21,840.00	\$27,960.00	\$22,800.00	\$29,520.00	4.4%	5.6%		
Each Credit over 20	\$1,820.00	\$2,330.00	\$1,900.00	\$2,460.00	4.4%	5.6%		
MBA Full-Time Program - Continuing Students (2nd year and beyond)								
Per Credit	\$1,820.00	\$2,330.00	\$1,820.00	\$2,330.00	0.0%	0.0%		
12-18 Credits	\$21,840.00	\$27,960.00	\$21,840.00	\$27,960.00	0.0%	0.0%		
Each Credit over 18	\$1,820.00	\$2,330.00	\$1,820.00	\$2,330.00	0.0%	0.0%		
MBA Part-Time Program (no new entry)								
Per Credit	\$1,568.00	\$1,568.00	\$1,640.00	\$1,640.00	4.6%	4.6%		
Executive MBA (comprehensive rate)								
Entering Students-1st year (guaranteed 2 year rates)	\$33,590.00	\$33,590.00	\$35,100.00	\$35,100.00	4.5%	4.5%		
Continuing Students-2nd year (guaranteed 2nd year rate)	\$33,590.00	\$33,590.00	\$33,590.00	\$33,590.00	0.0%	0.0%		
Summer - Tuition Per Credit	\$1,720.00	\$1,720.00	\$1,797.00	\$1,797.00	4.5%	4.5%		
Summer - Program Fee (flat)	\$28.00	\$28.00	\$29.00	\$29.00	3.6%	3.6%		
Online/Part-Time MBA & Certificates								
Per Credit	\$1,720.00	\$1,720.00	\$1,797.00	\$1,797.00	4.5%	4.5%		
Master of Business Taxation (MBT) Program & Certificates								
Per Credit	\$1,478.00	\$1,478.00	\$1,545.00	\$1,545.00	4.5%	4.5%		
Master of Accounting								
Per Credit	\$1,180.00	\$1,950.00	\$1,230.00	\$2,060.00	4.2%	5.6%		
10-18 Credits	\$11,800.00	\$19,500.00	\$12,300.00	\$20,600.00	4.2%	5.6%		
Each Credit over 18	\$1,180.00	\$1,950.00	\$1,230.00	\$2,060.00	4.2%	5.6%		
Master of Science in Finance								
Per Credit (Summer-Fall-Spring Program)	\$1,085.00	\$1,545.00	\$1,115.00	\$1,585.00	2.8%	2.6%		
Master of Science in Business Analytics								
Per Credit (Summer-Fall-Spring Program)	\$1,085.00	\$1,545.00	\$1,134.00	\$1,630.00	4.5%	5.5%		
Master of Applied Business Analytics								
Per Credit	\$1,720.00	\$1,720.00	\$1,720.00	\$1,720.00	0.0%	0.0%		
Master of Science in Supply Chain								
Per Credit	\$1,680.00	\$1,680.00	\$1,760.00	\$1,760.00	4.8%	4.8%		
Master of Science in Marketing								
Per Credit	\$1,339.00	\$1,687.00	\$1,400.00	\$1,780.00	4.6%	5.5%		
Medical School (TC & UMD)								
<i>(All per term, including summer)</i>								
1st year students (Fall 2024 start)	\$14,287.00	\$21,419.00	\$14,852.00	\$22,490.00	4.0%	5.0%		
2nd year students (Fall 2023 start)	\$14,287.00	\$21,419.00	\$14,287.00	\$21,419.00	0.0%	0.0%		
3rd year students (Fall 2022 start)	\$13,973.00	\$20,695.00	\$13,973.00	\$20,695.00	0.0%	0.0%		
4th year students (Fall 2021 start)	\$13,665.00	\$19,995.00	\$13,665.00	\$19,995.00	0.0%	0.0%		
5th year students (Fall 2010 start)	\$13,397.00	\$19,226.00	\$13,397.00	\$19,226.00	0.0%	0.0%		
6th year students (Fall 2019 start)	\$13,134.00	\$18,849.00	\$13,134.00	\$18,849.00	0.0%	0.0%		
7th year students (Fall 2018 start)	\$12,876.00	\$18,479.00	\$12,876.00	\$18,479.00	0.0%	0.0%		
8th year students (Fall 2017 start)	\$12,624.00	\$17,599.00	\$12,624.00	\$17,599.00	0.0%	0.0%		
9th year students (Fall 2016 start)	\$12,624.00	\$17,599.00	\$12,624.00	\$17,599.00	0.0%	0.0%		
Medical School students pay their first year rate for the entirety of their degree program.								
Medical School Pre-admit (99PRD): Same as Graduate School								
Physical Therapy (DPT)								
	\$9,163.00	\$10,500.00	\$9,163.00	\$10,500.00	0.0%	0.0%		

Attachment 4: University of Minnesota 2024-2025 Tuition Rate Plan - Revised

	C		D		E		F	
	2023-2024		2024-2025		2024-2025		2024-2025	
	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident
School of Dentistry								
DDS								
1st Year Students (Fall 2024 Start) (fall and spring)	\$22,721.00	\$42,092.00	\$24,084.00	\$44,618.00	6.0%		6.0%	
1st Year Students (Fall 2024 Start) (summer)	\$12,641.00	\$23,013.00	\$13,399.00	\$24,394.00	6.0%		6.0%	
2nd Year Students (Fall 2023 Start) (fall and spring)	\$22,721.00	\$42,092.00	\$23,459.00	\$43,460.00	3.2%		3.3%	
2nd Year Students (Fall 2023 Start) (summer)	\$12,641.00	\$23,013.00	\$13,052.00	\$23,761.00	3.3%		3.3%	
3rd Year Students (Fall 2022 Start) (fall and spring)	\$22,290.00	\$41,292.00	\$22,680.00	\$42,015.00	1.7%		1.8%	
3rd Year Students (Fall 2022 Start) (summer)	\$12,400.00	\$22,576.00	\$12,617.00	\$22,971.00	1.8%		1.7%	
4th Year Students (Fall 2021 Start) (fall and spring)	\$21,442.00	\$39,721.00	\$21,442.00	\$39,721.00	0.0%		0.0%	
4th Year Students (Fall 2021 Start) (summer)	\$11,928.00	\$21,717.00	\$11,928.00	\$21,717.00	0.0%		0.0%	
Program Completion & Alternate Curriculum Fall & Spring (Per Credit)	\$1,100.00	\$2,200.00	\$1,200.00	\$2,400.00	9.1%		9.1%	
Alternate curriculum Summer (Per Credit)	\$1,100.00	\$2,200.00	\$1,200.00	\$2,400.00	9.1%		9.1%	
PASS								
Admit Spring 2025 (fall and spring)		\$48,179.00		\$51,070.00			6.0%	
Admit Spring 2025 (summer)		\$26,889.00		\$28,502.00			6.0%	
Admit Spring 2024 (fall and spring)		\$48,179.00		\$48,179.00			0.0%	
Admit Spring 2024 (summer)		\$26,889.00		\$26,889.00			0.0%	
Admit Spring 2023 (fall and spring)		\$45,776.00		\$45,776.00			0.0%	
Admit Spring 2023 (summer)		\$25,548.00		\$25,548.00			0.0%	
Program Completion & Alt Curriculum Year 1&2 Fall & Spring (Per Credit)		\$2,400.00		\$2,500.00			4.2%	
Program Completion & Alt Curriculum Year 1&2 Summer (Per Credit)		\$2,400.00		\$2,500.00			4.2%	
Dental Therapist Graduate Program								
Semester	\$9,866.00	\$15,264.00	\$10,310.00	\$16,104.00	4.5%		5.5%	
Program Completion & Alternate Curriculum (Per Credit)	\$709.00	\$1,155.00	\$785.00	\$1,215.00	10.7%		5.2%	
Master of Dental Hygiene								
Per Credit	\$1,081.00	\$1,081.00	\$1,130.00	\$1,130.00	4.5%		4.5%	
Certificate Programs								
Oral Maxillofacial Surgery	\$2,289.00	\$2,289.00	\$2,392.00	\$2,392.00	4.5%		4.5%	
Endodontics	\$3,659.00	\$3,659.00	\$3,824.00	\$3,824.00	4.5%		4.5%	
TMD and Orofacial	\$3,659.00	\$3,659.00	\$3,824.00	\$3,824.00	4.5%		4.5%	
Oral Health Services for Older Adults	\$3,659.00	\$3,659.00	\$3,824.00	\$3,824.00	4.5%		4.5%	
GPR	\$3,659.00	\$3,659.00	\$3,824.00	\$3,824.00	4.5%		4.5%	
Endodontics	\$5,259.00	\$5,259.00	\$5,496.00	\$5,496.00	4.5%		4.5%	
Orthodontics	\$5,259.00	\$5,259.00	\$5,496.00	\$5,496.00	4.5%		4.5%	
Pediatrics	\$5,259.00	\$5,259.00	\$5,496.00	\$5,496.00	4.5%		4.5%	
Periodontology	\$5,259.00	\$5,259.00	\$5,496.00	\$5,496.00	4.5%		4.5%	
Oral Health Educator Certificate (Per Credit)	\$750.00	\$750.00	\$750.00	\$750.00	0.0%		0.0%	
School of Nursing								
Doctor of Nursing Practice (DNP)								
Post Graduate Certificates								
Adult Health/Gerontological Clinical Nurse Specialist								
Adult Health/Gerontological Primary Care Nurse Practitioner								
Nurse Midwifery								
Pediatric Clinical Nurse Specialist								
Pediatric Nurse Practitioner								
Psychiatric Mental Health Nurse Practitioner								
Women's Health Nurse Practitioner								
Health Care Design & Innovation								
Leadership in Health Information Technology for Health Professionals								
99PRD								
Per Credit	\$1,053.00	\$1,053.00	\$1,100.00	\$1,100.00	4.5%		4.5%	
9 Credits or more	\$9,477.00	\$9,477.00	\$9,900.00	\$9,900.00	4.5%		4.5%	
Master of Nursing (MN)								
Per Credit	\$781.00	\$781.00	\$816.00	\$816.00	4.5%		4.5%	
Masters in Integrative Health and Wellbeing Coaching								
Integrative Therapies and Healing Practices Certificate								
Per Credit	\$1,539.00	\$1,539.00	\$1,608.00	\$1,608.00	4.5%		4.5%	
6-14 Credits	\$9,234.00	\$9,234.00	\$9,648.00	\$9,648.00	4.5%		4.5%	
Each Credit over 14	\$1,539.00	\$1,539.00	\$1,608.00	\$1,608.00	4.5%		4.5%	

Attachment 4:
University of Minnesota 2024-2025
Tuition Rate Plan - Revised

	C 2023-2024 Semester Rates		D 2024-2025 Semester Rates		E 2024-2025 Semester Rates		F 2024-2025 Semester Rates	
	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident
College of Pharmacy (TC & UMD) and Professional Program								
PharmD & Professional Program (Fall 2024 Start and program completion)								
Per Credit	\$1,161.00	\$1,334.00	\$1,207.00	\$1,394.00	4.0%		4.5%	
12 or more Credits	\$13,932.00	\$16,000.00	\$14,484.00	\$16,728.00	4.0%		4.6%	
PharmD & Professional Program (Enrolled Prior to Fall 2024)								
Per Credit	\$1,161.00	\$1,334.00	\$1,161.00	\$1,334.00	0.0%		0.0%	
12 or more Credits	\$13,932.00	\$16,000.00	\$13,932.00	\$16,000.00	0.0%		0.0%	
PharmD & Professional Program (all students)								
Non-Degree and Non-resident, Summer Only: Per Credit		\$1,161.00		\$1,207.00				4.0%
Non-Degree and Non-resident, Summer Only: 12 or more Credits		\$13,932.00		\$14,484.00				4.0%
Master of Occupational Therapy and Occupational Therapy Doctorate								
Fall & Spring Flat Rate (previously 12 credits or more per semester)	\$13,123.00	\$19,716.00	\$13,123.00	\$19,716.00	0.0%		0.0%	
Summer Flat Rate (previously varied by credit load)	\$9,186.00	\$13,801.00	\$9,186.00	\$13,801.00	0.0%		0.0%	
Program Completion (per credit)	\$1,093.00	\$1,643.00	\$1,093.00	\$1,643.00	0.0%		0.0%	
Master of Medical Laboratory Science								
Per Credit	\$765.00	\$765.00	\$788.00	\$788.00	3.0%		3.0%	
Master of Biomedical Laboratory Science								
Per Credit	\$931.00	\$931.00	\$931.00	\$931.00	0.0%		0.0%	
College of Veterinary Medicine								
1st Year Students (Fall 2024 Start)								
Per Credit	\$1,782.00	\$3,312.00	\$1,862.00	\$3,461.00	4.5%		4.5%	
9 Credits or more (Term)	\$16,038.00	\$29,808.00	\$16,758.00	\$31,149.00	4.5%		4.5%	
2nd Year Students (Fall 2023 Start)								
Per Credit	\$1,782.00	\$3,312.00	\$1,782.00	\$3,312.00	0.0%		0.0%	
9 Credits or more (Term)	\$16,038.00	\$29,808.00	\$16,038.00	\$29,808.00	0.0%		0.0%	
3rd Year Students (Fall 2022 start)								
Per Credit	\$1,722.00	\$3,200.00	\$1,722.00	\$3,200.00	0.0%		0.0%	
9 Credits or more (Term)	\$15,498.00	\$28,800.00	\$15,498.00	\$28,800.00	0.0%		0.0%	
4th Year Students (Enrolled prior to Fall 2022)								
Per Credit	\$1,697.00	\$3,154.00	\$1,714.00	\$3,186.00	1.0%		1.0%	
9 Credits or more (Term)	\$15,273.00	\$28,386.00	\$15,426.00	\$28,674.00	1.0%		1.0%	
3rd Semester, Senior Year (Summer)								
Per Credit	\$1,272.00	\$2,365.00	\$1,507.00	\$2,800.00	18.5%		18.4%	
9 Credits or more (Term)	\$11,448.00	\$21,285.00	\$13,563.00	\$25,200.00	18.5%		18.4%	
Program Completion Rate								
Per Credit	\$500.00	\$500.00	\$500.00	\$500.00	0.0%		0.0%	
1st Year North Dakota Rcpty (75% non-resident rate) (Fall 2024 Start)								
Per Credit		\$2,484.00		\$2,595.75				4.5%
9 Credits or more (Term)		\$22,356.00		\$23,361.75				4.5%
2nd Year North Dakota Rcpty (75% non-resident rate) (Fall 2023 Start)								
Per Credit		\$2,484.00		\$2,484.00				0.0%
9 Credits or more (Term)		\$22,356.00		\$22,356.00				0.0%
3rd Year North Dakota Rcpty (75% non-resident rate) (Fall 2022 Start)								
Per Credit		\$2,400.00		\$2,400.00				0.0%
9 Credits or more (Term)		\$21,600.00		\$21,600.00				0.0%
4th Year North Dakota Rcpty (75% non-resident rate) - Enrolled prior to Fall 2022								
Per Credit		\$2,365.50		\$2,389.50				1.0%
9 Credits or more (Term)		\$21,289.50		\$21,505.50				1.0%
North Dakota Rcpty, 3rd Semester, Senior Year (75% non-resident rate)								
Per Credit		\$1,773.75		\$2,100.00				18.4%
9 Credits or more (Term)		\$15,963.75		\$18,900.00				18.4%
Poultry Health Certificate								
Per Credit	\$875.00	\$875.00	\$875.00	\$875.00	0.0%		0.0%	

Attachment 4: University of Minnesota 2024-2025 Tuition Rate Plan - Revised

	C 2023-2024 Semester Rates		D 2024-2025 Semester Rates		E 2024-2025 Semester Rates		F 2024-2025 Semester Rates	
	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident
School of Public Health								
Per Credit (Fall & Spring) (includes 99PRD)	\$1,107.00	\$1,455.00	\$1,156.00	\$1,520.00	4.4%		4.5%	
Per Credit (Summer)	\$1,107.00	\$1,107.00	\$1,156.00	\$1,156.00	4.4%		4.4%	
Executive MHA								
Per Credit	\$1,632.00	\$1,632.00	\$1,632.00	\$1,632.00	0.0%		0.0%	
Healthcare Administration Masters								
Per Credit	\$1,107.00	\$1,455.00	\$1,156.00	\$1,520.00	4.4%		4.5%	
Public Health Practice								
Public Health Certificate in Core Concepts								
American Indian Public Health and Wellness Certificate								
Per Credit	\$1,107.00	\$1,107.00	\$1,156.00	\$1,156.00	4.4%		4.4%	
Management Fundamentals in Health Care Organizations Certificate								
Per Credit	\$1,632.00	\$1,632.00	\$1,632.00	\$1,632.00	0.0%		0.0%	
Healthcare Management Certificate								
Per Credit	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00	0.0%		0.0%	
Crookston								
Undergraduate								
Per Credit	\$441.50	\$441.50	\$448.00	\$448.00	1.5%		1.5%	
13 Credits or more	\$5,739.00	\$5,739.00	\$5,824.00	\$5,824.00	1.5%		1.5%	
Duluth								
Undergraduate								
Per Credit	\$491.00	\$700.40	\$498.40	\$710.95	1.5%		1.5%	
13 Credits or more	\$6,383.00	\$9,105.00	\$6,479.00	\$9,242.00	1.5%		1.5%	
Non-Degree, Nonresident, Summer Only								
Per Credit		\$491.00		\$498.40			1.5%	
13 Credits or more		\$6,383.00		\$6,479.00			1.5%	
Midwest Nonresident (Replaced Midwest Student Exchange Program (MSEP) effective FY24; includes MI, IL, IA, NE, KS, MO, IN, OH, and SD (SD added FY25))								
Per Credit		\$491.00		\$498.40			1.5%	
13 Credits or more		\$6,383.00		\$6,479.00			1.5%	
International Program Partner								
Per Credit		\$515.55		\$523.30			1.5%	
13 Credits or more		\$6,702.00		\$6,802.00			1.5%	
Swenson College of Science and Engineering Tuition Surcharge								
Students first enrolled in SCSE in fall 2021 or later. (paid in addition to rates above; fall, spring & summer)								
Flat	\$250.00	\$250.00	\$250.00	\$250.00	0.0%		0.0%	
Graduate School General Programs: Same as Twin Cities								
Medical School: Same as Twin Cities								
School of Pharmacy: Same as Twin Cities								
Departmental Masters and Post-baccalaureate Certificates								
Master of Education (MEd)								
Master of Environmental Education (MEEd)								
Master of Environmental Health & Safety (MEnvHlthSa)								
Master of Social Work (MSW)								
Master of Tribal Administration and Governance (MTAG)								
Master of Tribal Resource & Environmental Stewardship (MTRES)								
Master of Professional Studies in Multidisciplinary Research & Creativity (MPS)								
Per Credit	\$715.80	\$715.80	\$726.55	\$726.55	1.5%		1.5%	
Certificate Programs								
Post-baccalaureate Community College Teaching								
Post-baccalaureate Environmental Education								
Post-Baccalaureate Indigenous Environmental Systems and Principles of Resource Management								
Post-Baccalaureate Tribal Administration and Leadership								
Post-Baccalaureate Tribal Sovereignty and Federal Indian Law								
Post-Baccalaureate Tribal Natural Resource Stewardship, Economics, and Law								
Per Credit	\$715.80	\$715.80	\$726.55	\$726.55	1.5%		1.5%	
MBA								
(degree and non-degree seeking students)								
Per Credit (Duluth)	\$1,001.25	\$1,001.25	\$1,016.00	\$1,016.00	1.5%		1.5%	
Rochester MBA, Per Credit	\$1,111.15	\$1,111.15	\$1,128.00	\$1,128.00	1.5%		1.5%	

**Attachment 4:
University of Minnesota 2024-2025
Tuition Rate Plan - Revised**

	C		D		E		F	
	2023-2024		2024-2025		2024-2025		2024-2025	
	Semester Rates		Semester Rates		Semester Rates		Semester Rates	
	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident
Morris								
Undergraduate								
Per Credit (fall and spring)	\$497.40	\$580.15	\$505.00	\$589.00	1.5%	1.5%		
13 Credits or more (fall and spring)	\$6,466.00	\$7,541.00	\$6,565.00	\$7,657.00	1.5%	1.5%		
Per Credit (summer)	\$497.40	\$497.40	\$505.00	\$505.00	1.5%	1.5%		
13 Credits or more (summer)	\$6,466.00	\$6,466.00	\$6,565.00	\$6,565.00	1.5%	1.5%		
<hr/>								
Rochester								
Undergraduate								
Per Credit	\$509.90	\$509.90	\$532.85	\$532.85	4.5%	4.5%		
13 Credits or more	\$6,628.00	\$6,628.00	\$6,927.00	\$6,927.00	4.5%	4.5%		

Attachment 5

DEFINITIONS OF CURRENT SPONSORED AND NONSPONSORED FUNDS

Current funds can be categorized as either sponsored or nonsponsored.

Sponsored funds consist of grants and contracts administered through the Sponsored Project Administration (SPA). All sponsored research funds are restricted and are generally subject to special grant reporting procedures. Restricted funds are subject to legally binding limits and rules established by the person or organization providing these funds for specific purposes, programs, departments, or schools.

Within the nonsponsored grouping, funds can be classified as unrestricted or restricted. Unrestricted current funds include all funds over which the University retains full control to direct their use in achieving its institutional purposes. Most current nonsponsored funds are unrestricted; exceptions include state specials, federal appropriations, and other restricted funds such as foundations, endowment targets, local governments, etc. Externally restricted funds may be used only in accordance with the purposes established by the source of such funds.

CURRENT NONSPONSORED FUNDS

CENTRALLY DISTRIBUTED AND ATTRIBUTED

Operations and Maintenance: Operations and maintenance funds consist primarily of the general appropriation from the State of Minnesota plus tuition revenues. Other sources contributing to the fund include application and student payment-related fees, Enterprise Assessment fees, and a transfer of funds from the central reserves fund.

State Specials: State Specials funds consist of restricted-purpose appropriations from the State. The University receives State Special allocations in seven categories: 1) Agriculture, 2) Health Sciences, 3) Technology, 4) System Specials (miscellaneous items including support for Labor Education Service, Natural Resources Research Institute, Center for Urban and Regional Affairs, the Bell Museum of Natural History, and the Humphrey Exhibit, 5) U/Mayo Partnership, 6) Cigarette Tax proceeds, and 7) MN Care

Indirect Cost Recoveries: Indirect Cost Recovery funds consist of partial reimbursements to the University for the indirect costs of research based on a percentage of sponsored grant and contract direct costs. Indirect costs of research are those expenses (often referred to as overhead) that cannot be readily and exclusively attributed to a specific research grant or contract. Components of the indirect cost rate include departmental administration, sponsored projects general administration, building and equipment depreciation, operations and maintenance, and libraries.

Central Reserves: Central Reserve funds consist of non-dedicated investment earnings and recognized gains and losses.

SELF-SUSTAINING

Auxiliary Enterprises: The University operates a number of self-sustaining operations called auxiliary enterprises. Their primary mission is to provide goods and/or services to individuals within the University, including students, faculty, and staff. They also provide goods and services to the public. Residence halls, student unions, bookstores, parking and transit, health services, and intercollegiate athletics are the University's primary auxiliary enterprises. Auxiliary enterprises largely operate as freestanding entities, responsible for covering all of their operating costs with fees charged.

Internal Service Activities: Internal Service Activities are institutional services established for reasons of convenience, cost, or control. Their primary mission is to provide goods and/or services to other University departments. Examples of major internal service activities include U Market, Fleet Services, Printing and Graphic Arts, and Research Animal Resources.

Other Unrestricted Accounts, including Central Pools: The resources in these funds are primarily miscellaneous external sales and services. The central fringe benefit recovery pools are also included in this classification.

Other Restricted Accounts: Nonsponsored restricted funds consist of funds from business and industry, foundations including the University of Minnesota Foundation and the Arboretum Foundation, federal and state work-study, SEOG and PELL grants, private practice, and restricted funds from federal, state, and local government agencies, individuals and others.

CURRENT SPONSORED FUNDS

Federal Research: These funds are composed of expendable research grants, appropriations, and contracts received from the federal government.

Other Sponsored Research: Other sponsored research funds include grants, appropriations, and contracts from non-federal sources, including state and local government and private sources.

**Attachment 6:
University of Minnesota 2024-2025 Course and Class Fees**

Campus/College	Fee Name	Dimension	Rate type	2024 Amount	2025 Amount	Percent Change
<u>Crookston</u>						
Crookston	Advanced Animal Evaluation - Dairy	Consumable Materials	Flat	\$42.00	\$42.00	0.0%
Crookston	Analytical Chemistry/Spectroscopy	Consumable Materials	Flat	\$35.00	\$35.00	0.0%
Crookston	Anatomy & Physiology I	Consumable Materials	Flat	\$45.00	\$45.00	0.0%
Crookston	Animal Evaluation	Consumable Materials	Flat	\$35.00	\$35.00	0.0%
Crookston	Animal Health & Disease	Consumable Materials	Flat	\$21.00	\$21.00	0.0%
Crookston	Animal Science Field Trip	Travel/Lodging/Transport	Flat	\$12.00	\$12.00	0.0%
Crookston	Animal Science Lab Tier 1	Travel/Lodging/Transport	Flat	\$25.00	\$25.00	0.0%
Crookston	Animal Science Lab Tier 2	Consumable Materials	Flat	\$30.00	\$30.00	0.0%
Crookston	Animal Science Lab Tier 3	Consumable Materials	Flat	\$40.00	\$40.00	0.0%
Crookston	Animal Science Lab Tier 4	Consumable Materials	Flat	\$70.00	\$70.00	0.0%
Crookston	Applied Animal Nutrition	Consumable Materials	Flat	\$53.00	\$53.00	0.0%
Crookston	Beef Production	multiple components	Flat	\$16.50	\$38.00	38.0%
Crookston	CPR Certification	Service	Flat	\$26.00	\$26.00	0.0%
Crookston	Criminal Investigation	Access/Rent/Usage/Own	Flat	\$50.00	\$50.00	0.0%
Crookston	Cultural Immersion Practicum	Travel/Lodging/Transport	Flat	\$75.00	\$75.00	0.0%
Crookston	Develop Appropriate Pre-Primary Education	Consumable Materials	Flat	\$35.00	\$35.00	0.0%
Crookston	Ecology	Consumable Materials	Flat	\$12.00	\$12.00	0.0%
Crookston	Elementary Student Teaching	Exam/Assessment	Flat	\$270.00	\$270.00	0.0%
Crookston	Elements of Forestry	Consumable Materials	Flat	\$35.00	\$35.00	0.0%
Crookston	Entomology (NATR)	Consumable Materials	Flat	\$38.00	\$38.00	0.0%
Crookston	Equine Exercise Physiology	Travel/Lodging/Transport	Flat	\$40.00	\$40.00	0.0%
Crookston	Equine Reproduction Techniques	Consumable Materials	Flat	\$50.00	\$50.00	0.0%
Crookston	Facility Maintenance/Safety	Consumable Materials	Flat	\$25.00	\$25.00	0.0%
Crookston	Fate of Chemicals in the Environment	Consumable Materials	Flat	\$59.00	\$59.00	0.0%
Crookston	Fisheries	Consumable Materials	Flat	\$32.00	\$32.00	0.0%
Crookston	Floral Design Tier 1	Consumable Materials	Flat	\$90.00	\$90.00	0.0%
Crookston	HORT 3093	Consumable Materials	Flat	\$35.00	\$35.00	0.0%
Crookston	Limnology	multiple components	Flat	\$90.00	\$90.00	0.0%
Crookston	Livestock Facilities & Env Sci	Travel/Lodging/Transport	Flat	\$18.00	\$18.00	0.0%
Crookston	Mammalogy (BIOL)	Consumable Materials	Flat	\$78.00	\$78.00	0.0%
Crookston	Mammalogy (NATR)	Travel/Lodging/Transport	Flat	\$250.00	\$250.00	0.0%
Crookston	Organic Chemistry 1	Consumable Materials	Flat	\$60.00	\$60.00	0.0%
Crookston	Ornithology (a)	Consumable Materials	Flat	\$43.00	\$43.00	0.0%
Crookston	Ornithology (b)	Consumable Materials	Flat	\$43.00	\$43.00	0.0%
Crookston	Park/Rec Management	Travel/Lodging/Transport	Flat	\$30.00	\$30.00	0.0%
Crookston	Perergrine Testing - Business	Exam/Assessment	Flat		\$40.00	new
Crookston	Private Music Instruction	Individual Instruction	Flat	\$50.00	\$50.00	0.0%
Crookston	Raptor Ecology	Travel/Lodging/Transport	Flat	\$75.00	\$75.00	0.0%
Crookston	Reproduction AI and Lactation	Consumable Materials	Flat	\$117.00	\$117.00	0.0%
Crookston	Plant Taxonomy	Consumable Materials	Flat	\$20.00	\$20.00	0.0%
Crookston	Science Lab - Tier 1	Consumable Materials	Flat	\$20.00	\$20.00	0.0%
Crookston	Science Lab - Tier 2	Consumable Materials	Flat	\$30.00	\$30.00	0.0%
Crookston	Science Lab - Tier 3	Consumable Materials	Flat	\$40.00	\$40.00	0.0%
Crookston	Soil Fertility & Plant Nutrition	Consumable Materials	Flat	\$33.00	\$33.00	0.0%
Crookston	Special Topics in Animal Science	multiple components	Flat	\$50.00	\$50.00	0.0%
Crookston	Welding/Manufacturing	Consumable Materials	Flat	\$30.00	\$30.00	0.0%
Crookston	Wildlife Management - Special Topics	multiple components	Flat	\$71.00	\$71.00	0.0%
Crookston	Wildlife/Ecology Management	Consumable Materials	Flat	\$24.00	\$24.00	0.0%
Crookston	ANSC 3302 - Small Ruminant Production	multiple components	Flat		\$56.00	new
Crookston	ANSC 3301 - Swine & Poultry Production	multiple components	Flat		\$40.00	new
Crookston	ANSC 1033 - Intro to Comp Animals	Consumable Materials	Flat	\$28.00	\$66.00	135.7%
Crookston	EQSC 2202 - Advanced Equine Evaluation	Consumable Materials	Flat	\$316.00	\$316.00	0.0%
Crookston	EQSC 2110 - Farrier Science	Consumable Materials	Flat	\$55.00	\$84.00	52.7%
Crookston	EQSC 2112 - Riding Instructor Training	Exam/Assessment	Flat	\$335.00	\$335.00	0.0%
Crookston	EQSC 4102 - Equine Mgmt	Consumable Materials	Flat	\$55.00	\$55.00	0.0%
Crookston	Victimology	Access/Rent/Usage/Own	Flat	\$77.00	\$77.00	0.0%
<u>Duluth</u>						
Duluth	Acting Voice Lesson	Individual Instruction	Flat	\$328.00	\$328.00	0.0%
Duluth	American Sign Language (ASL) Lab	Access/Rent/Usage/Own	Flat	\$55.00	\$55.00	0.0%
Duluth	Applied Music Lesson - Music Majors	Individual Instruction	Flat	\$214.00	\$218.00	1.9%
Duluth	Applied Music Lesson - Music Majors	Individual Instruction	PerCredit	\$58.00	\$60.00	3.4%
Duluth	Applied Music Lesson - Non-majors	Individual Instruction	Flat	\$334.00	\$342.00	2.4%
Duluth	Assessment in the Classroom	Service	Flat	\$30.00	\$30.00	0.0%
Duluth	Biology Lab Fee	Consumable Materials	Flat	\$88.75	\$93.19	5.0%

**Attachment 6:
University of Minnesota 2024-2025 Course and Class Fees**

Campus/College	Fee Name	Dimension	Rate type	2024 Amount	2025 Amount	Percent Change
Duluth	Bowling	Access/Rent/Usage/Own	Flat	\$58.00	\$58.00	0.0%
Duluth	CEHSP Background Check	Service	Flat	\$44.00	\$44.00	0.0%
Duluth	Chemical Engineering Lab Tier 1	Consumable Materials	Flat	\$31.00	\$31.00	0.0%
Duluth	Chemical Engineering Lab Tier 2	Consumable Materials	Flat	\$62.00	\$62.00	0.0%
Duluth	Chemistry/Biochemistry Fee	Consumable Materials	Flat	\$80.00	\$84.00	5.0%
Duluth	Civil Engineering Lab	Consumable Materials	Flat	\$62.00	\$62.00	0.0%
Duluth	College in the Schools UMD	Tuition	Flat	\$92.00	\$92.00	0.0%
Duluth	Computer Network Access Fee-Grad/M Active Status	Access/Rent/Usage/Own	Flat	\$6.00	\$6.00	0.0%
Duluth	Communication Science Disorders (CSD) Lab	Consumable Materials	PerCredit	\$12.00	\$12.00	0.0%
Duluth	Cross Country Skiing	Access/Rent/Usage/Own	Flat	\$43.00	\$45.00	4.7%
Duluth	EDUC EdTPA	Service	Flat	\$270.00	\$270.00	0.0%
Duluth	Electrical Engineering Lab	Consumable Materials	Flat	\$47.00	\$47.00	0.0%
Duluth	English Language/Culture Institute (ELCI) FILOT	multiple components	Flat	\$7,513.13	\$7,654.54	1.9%
Duluth	English Language/Culture Institute (ELCI) Sum FILOT	multiple components	Flat	\$7,060.20	\$7,188.69	1.8%
Duluth	French Cuisine/Culture	Consumable Materials	Flat		\$50.00	new
Duluth	Geography Field Trip/Geography of Soils	Travel/Lodging/Transport	Flat	\$40.00	\$160.00	300.0%
Duluth	Geographical Information Systems (GIS) Lab	Consumable Materials	Flat	\$20.00	\$20.00	0.0%
Duluth	Geography Activity Fee	Travel/Lodging/Transport	Flat		\$40.00	new
Duluth	Geological Sciences Field Trip	Travel/Lodging/Transport	Flat	\$20.00	\$20.00	0.0%
Duluth	Half Recital - Undergraduate Music Majors	Service	Flat	\$78.00	\$80.00	2.6%
Duluth	Infant and Pediatric First Aid/CPR/AED	Consumable Materials	Flat		\$26.00	new
Duluth	AHS Field Trip	Travel/Lodging/Transport	Flat	\$35.00	\$35.00	0.0%
Duluth	CPR/First Aid	Service	Flat	\$15.00	\$15.00	0.0%
Duluth	Intercultural Communication	Travel/Lodging/Transport	Flat	\$150.00	\$150.00	0.0%
Duluth	Marine Biology - Friday Harbor WA/Woods Hole MA	Travel/Lodging/Transport	Flat	\$2,495.00	\$2,495.00	0.0%
Duluth	Mechanical & Industrial Engineering Lab	Consumable Materials	Flat	\$42.00	\$42.00	0.0%
Duluth	Outdoor Education Methods	Travel/Lodging/Transport	Flat	\$81.00	\$81.00	0.0%
Duluth	Outdoor leadership	Travel/Lodging/Transport	Flat	\$286.00	\$286.00	0.0%
Duluth	PE Kayaking	Access/Rent/Usage/Own	Flat	\$74.00	\$77.00	4.1%
Duluth	PE Rock Climbing	Access/Rent/Usage/Own	Flat	\$63.00	\$66.00	4.8%
Duluth	Art and Design Consumables Fee	Consumable Materials	Flat	\$35.00	\$35.00	0.0%
Duluth	Group Voice Lesson	Individual Instruction	Flat	\$158.00	\$158.00	0.0%
Duluth	Private Singing Lesson	Individual Instruction	Flat	\$352.00	\$342.00	-2.8%
Duluth	Recital - Undergraduate Music Majors	Service	Flat	\$156.00	\$160.00	2.6%
Duluth	Recreation Course Fee	Travel/Lodging/Transport	Flat	\$95.00	\$95.00	0.0%
Duluth	Ropes Course Management	Access/Rent/Usage/Own	Flat	\$100.00	\$100.00	0.0%
Duluth	Social Work Field Fee	Service	Flat	\$117.00	\$117.00	0.0%
Duluth	UST 1000: Clifto Strengths Inventory	Exam/Assessment	Flat	\$20.00	\$20.00	0.0%
Duluth	Wasatch-Uinta Field Camp Room and Board	Travel/Lodging/Transport	Flat	\$2,937.00	\$2,950.00	0.4%
Duluth	Mojave Field Class	Travel/Lodging/Transport	Flat	\$200.00	\$200.00	0.0%
<u>Morris</u>						
Morris	Concert Choir Performance Tour	Travel/Lodging/Transport	Flat	\$125.00	\$125.00	0.0%
Morris	Education Program Fee	Program	Flat	\$300.00	\$300.00	0.0%
Morris	Elementary Ed Practicum: Cross Cultural Experience	Travel/Lodging/Transport	Flat	\$475.00	\$475.00	0.0%
Morris	Endorsement/Additional Licensure Fee	Program	Flat	\$200.00	\$200.00	0.0%
Morris	Minneapolis Museum Travel	Travel/Lodging/Transport	PerCredit	\$25.00	\$25.00	0.0%
Morris	Private Music Lesson	Individual Instruction	Flat	\$375.00	\$375.00	0.0%
Morris	Student Teaching Fee	Exam/Assessment	Flat	\$400.00	\$400.00	0.0%
Morris	Studio Art Materials Fee	Consumable Materials	PerCredit	\$25.00	\$25.00	0.0%
Morris	Studio Art Materials Fee II	Consumable Materials	Flat	\$75.00	\$75.00	0.0%
Morris	Symphonic Winds Retreat	Travel/Lodging/Transport	Flat	\$120.00	\$120.00	0.0%
<u>Rochester</u>						
Rochester	Environmental Health Field Trips & Supplies	Travel/Lodging/Transport	Flat	\$14.00	\$14.00	0.0%
Rochester	Environmental Health Field Trips & Supplies	Consumable Materials	Flat	\$28.00	\$28.00	0.0%
Rochester	Lab Supplies for Anatomy & Physiology	Consumable Materials	Flat	\$5.00	\$5.00	0.0%
Rochester	Lab Supplies for Anatomy & Physiology II	Consumable Materials	Flat	\$15.00	\$15.00	0.0%
Rochester	Lab Supplies for Biochemistry II	Consumable Materials	Flat	\$85.00	\$85.00	0.0%
Rochester	Lab Supplies for Integrative Biology	Consumable Materials	Flat	\$50.00	\$50.00	0.0%
Rochester	Lab Supplies for Chemical Reactivity	Consumable Materials	Flat	\$40.00	\$40.00	0.0%
Rochester	Lab Supplies for Chemical Structures	Consumable Materials	Flat	\$20.00	\$20.00	0.0%
Rochester	Lab Supplies for General Chemistry II	Consumable Materials	Flat	\$20.00	\$20.00	0.0%
Rochester	Lab Supplies for Microbiology	Consumable Materials	Flat	\$84.00	\$84.00	0.0%

**Attachment 6:
University of Minnesota 2024-2025 Course and Class Fees**

Campus/College	Fee Name	Dimension	Rate type	2024 Amount	2025 Amount	Percent Change
Rochester	Lab Supplies for Molecular/Cellular Biology	Consumable Materials	Flat	\$50.00	\$50.00	0.0%
Rochester	Lab Supplies for Organic Chemistry II	Consumable Materials	Flat	\$20.00	\$20.00	0.0%
Rochester	Trajesys Online Clinical Record	Access/Rent/Usage/Own	Flat	\$150.00	\$150.00	0.0%
Rochester	Humanities Activity Fee (Yoga Lessons)	Personnel	Flat	\$80.00	\$80.00	0.0%
Rochester	IDI Survey Fee	Exam/Assessment	Flat	\$19.00	\$19.00	0.0%
Rochester	Math Assesment for Pre-Calculus I	Exam/Assessment	Flat	\$25.00	\$25.00	0.0%
Twin Cities						
Carlson Schl of Mgmt	IBUS 2021: Design your Career in United Kingdom	Travel/Lodging/Transport	Flat	\$4,850.00	\$4,600.00	-5.2%
Carlson Schl of Mgmt	IBUS 3019: Equity in international Business	Travel/Lodging/Transport	Flat	\$6,000.00	\$6,650.00	10.8%
Carlson Schl of Mgmt	IBUS 3033W Bus Comm Global Context Asia	Travel/Lodging/Transport	Flat	\$5,550.00	\$6,845.00	23.3%
Carlson Schl of Mgmt	IBUS 3055 Innovating with Technology	Travel/Lodging/Transport	Flat	\$5,500.00	\$6,525.00	18.6%
Carlson Schl of Mgmt	IBUS 3081 Sustainability... Costa Rica	Travel/Lodging/Transport	Flat	\$5,200.00	\$5,200.00	0.0%
Carlson Schl of Mgmt	IBUS 3090 Solving... Problems Greece	Travel/Lodging/Transport	Flat	\$5,000.00	\$4,800.00	-4.0%
Carlson Schl of Mgmt	IBUS 3101 CIMBA Undergrad Semester Program	Program	Flat	\$1,000.00	\$1,000.00	0.0%
Carlson Schl of Mgmt	IBUS 3500 Program Fee - CGI Undergrad Exchg Prog	Program	Flat	\$2,500.00	\$2,500.00	0.0%
Carlson Schl of Mgmt	IBUS 3500 Semester Exchange Undergraduate	Tuition	Flat	\$7,248.00	\$7,574.00	4.5%
Carlson Schl of Mgmt	IBUS 3700 London Schl/Econ Admin Fee	Program	Flat	\$750.00	\$750.00	0.0%
Carlson Schl of Mgmt	IBUS 3700 Sec 001 London Schl/Econ - 1 Session	Tuition	Flat	\$3,255.00	\$3,465.00	6.5%
Carlson Schl of Mgmt	IBUS 3700 Sec 002 London Schl/Econ - 2 Sessions	Tuition	Flat	\$5,512.00	\$5,775.00	4.8%
Carlson Schl of Mgmt	IBUS 3700 Sec 003 London Schl/Econ - 3 Sessions	Tuition	Flat	\$6,300.00	\$6,825.00	8.3%
Carlson Schl of Mgmt	IBUS 3701 Vienna Summer Undergrad Program Fee	Program	Flat	\$750.00	\$750.00	0.0%
Carlson Schl of Mgmt	IBUS 3701 Vienna Summer UG Prog - 8 credits	Fee in Lieu of Tuition	Flat	\$4,460.00	\$4,460.00	0.0%
Carlson Schl of Mgmt	IBUS 3701 Vienna Summer UG Prog - 4 credits	Fee in Lieu of Tuition	Flat	\$2,230.00	\$2,230.00	0.0%
Carlson Schl of Mgmt	IBUS 3702 Copenhagen Summer Undergrad Prog	Program	Flat	\$750.00	\$750.00	0.0%
Carlson Schl of Mgmt	IBUS 3702 Copenhagen Summer UG Prog - 8 credits	Fee in Lieu of Tuition	Flat	\$4,460.00	\$4,460.00	0.0%
Carlson Schl of Mgmt	IBUS 3702 Copenhagen Summer UG Prog - 4 credits	Fee in Lieu of Tuition	Flat	\$2,230.00	\$2,230.00	0.0%
Carlson Schl of Mgmt	IBUS 3703 Norway Summer Undergrad Program	multiple components	Flat	\$2,980.00	\$2,980.00	0.0%
Carlson Schl of Mgmt	IBUS 3704 Shanghai Summer Undergrad Program	multiple components	Flat	\$2,423.00	\$2,423.00	0.0%
Carlson Schl of Mgmt	IBUS 3800 CIMBA Summer Program	Program	Flat	\$750.00	\$750.00	0.0%
Carlson Schl of Mgmt	IBUS 4071 Persuassion/Influence Morroco	Travel/Lodging/Transport	Flat	\$5,000.00	\$5,400.00	8.0%
Carlson Schl of Mgmt	IBUS 4125 Global Banking in Europe	Travel/Lodging/Transport	Flat	\$5,100.00	\$5,225.00	2.5%
Carlson Schl of Mgmt	IBUS 5140 Vienna Summer Graduate Program	Program	Flat	\$750.00	\$750.00	0.0%
Carlson Schl of Mgmt	IBUS 5212 Economic Growth/Middle Income Trap	Travel/Lodging/Transport	Flat		\$5,950.00	new
Carlson Schl of Mgmt	IBUS 5301 Copenhagen Summer Graduate Program	Program	Flat	\$750.00	\$750.00	0.0%
Carlson Schl of Mgmt	IBUS 5400 Global Business Practicum Europe	Travel/Lodging/Transport	Flat	\$3,000.00	\$4,000.00	33.3%
Carlson Schl of Mgmt	IBUS 5605 Shanghai Summer Graduate Program	Program	Flat	\$750.00	\$750.00	0.0%
Carlson Schl of Mgmt	IBUS 6402: Morocco Diversifies: Sustain/Entrepren	Travel/Lodging/Transport	Flat	\$3,000.00	\$3,600.00	20.0%
Carlson Schl of Mgmt	IBUS 6404 Leading... Ambiguity Australia	Travel/Lodging/Transport	Flat	\$3,000.00	\$4,000.00	33.3%
Carlson Schl of Mgmt	IBUS 6407 Grad Global Enrichment Japan	Travel/Lodging/Transport	Flat		\$4,000.00	new
Carlson Schl of Mgmt	IBUS 6997 MILI Global Valuation Lab in Stockholm	Travel/Lodging/Transport	Flat	\$3,000.00	\$3,600.00	20.0%
Carlson Schl of Mgmt	IBUS 6997 MILI Global Valuation Lab in Cambridge	Travel/Lodging/Transport	Flat	\$3,500.00	\$4,800.00	37.1%
Carlson Schl of Mgmt	IBUS 6403: Ghana Grows: Cocoa and More	Travel/Lodging/Transport	Flat	\$2,800.00	\$4,000.00	42.9%
Carlson Schl of Mgmt	MILI 6997 MILI Global Valuation Lab CA	Travel/Lodging/Transport	Flat	\$1,000.00	\$1,200.00	20.0%
Carlson Schl of Mgmt	SCO 6291 - Leadership Development Assessment	Exam/Assessment	Flat	\$80.00	\$137.00	71.3%
Carlson Schl of Mgmt	China Exec DBA Program	Tuition	Flat	\$85,150.00	\$88,715.00	4.2%
Carlson Schl of Mgmt	CSOM I-Core Abroad	Fee in Lieu of Tuition	Flat		\$19,000.00	new
Carlson Schl of Mgmt	MKTG 3001 Web-based Simulations	Access/Rent/Usage/Own	Flat		\$36.50	new
Col of Biological Sci	Field Trips - various	Travel/Lodging/Transport	Flat	\$21.00	\$21.00	0.0%
Col of Biological Sci	Nature of Life Summer Experience	Travel/Lodging/Transport	Flat	\$430.00	\$430.00	0.0%
Col of Biological Sci	Genetic Counseling - Internship 1 (summer)	Individual Instruction	Flat	\$1,000.00	\$1,000.00	0.0%
Col of Biological Sci	Genetic Counseling - Internship 2&3 (fall-spring)	Individual Instruction	Flat	\$2,000.00	\$2,000.00	0.0%
Col of Biological Sci	Itasca On-Site Transportation	Travel/Lodging/Transport	Flat	\$75.00	\$75.00	0.0%
Col of Biological Sci	Lab Consumables CBS	Consumable Materials	Flat	\$88.00	\$88.00	0.0%
Col of Biological Sci	Minnesota Flora	Travel/Lodging/Transport	Flat	\$16.00	\$16.00	0.0%
Col of Continuing & Prof Studies	College in the Schools TC	Tuition	Flat	\$145.00	\$145.00	0.0%
Col of Continuing & Prof Studies	Intensive English Program Tier 1	Program	Flat	\$825.00	\$835.00	1.2%
Col of Continuing & Prof Studies	Intensive English Program Tier 2	Program	Flat	\$1,285.00	\$1,300.00	1.2%
Col of Continuing & Prof Studies	Intensive English Program Tier 3	Program	Flat	\$1,650.00	\$1,670.00	1.2%
Col of Continuing & Prof Studies	Intensive English Program Tier 4	Program	Flat	\$2,570.00	\$2,600.00	1.2%
Col of Continuing & Prof Studies	MELP/TOEFL	Program	Flat	\$642.00	\$649.00	1.1%
Col of Design	Advanced Print Design	Consumable Materials	Flat	\$85.00	\$85.00	0.0%

**Attachment 6:
University of Minnesota 2024-2025 Course and Class Fees**

Campus/College	Fee Name	Dimension	Rate type	2024 Amount	2025 Amount	Percent Change
Col of Design	Apparel Assembly	Consumable Materials	Flat	\$40.00	\$40.00	0.0%
Col of Design	Architecture Design Studies	Access/Rent/Usage/Own	Flat	\$67.00	\$72.00	7.5%
Col of Design	Drawing and Critical Thinking	Consumable Materials	Flat	\$50.00	\$25.00	-50.0%
Col of Design	Color & Form	Consumable Materials	Flat	\$85.00	\$85.00	0.0%
Col of Design	Concept Visualization 1	Consumable Materials	Flat	\$100.00	\$100.00	0.0%
Col of Design	Creative Problem Solving	Exam/Assessment	Flat	\$35.00	\$35.00	0.0%
Col of Design	Design Fundamentals I	Access/Rent/Usage/Own	Flat	\$67.00	\$72.00	7.5%
Col of Design	Drawing and Design	Personnel	Flat	\$30.00	\$35.00	16.7%
Col of Design	Ecological Design	Travel/Lodging/Transport	Flat	\$275.00	\$250.00	-9.1%
Col of Design	Foundations: Color/Design in 2 and 3 Dimensions	Consumable Materials	Flat		\$1,000.00	new
Col of Design	Furniture Design: Practice	Consumable Materials	Flat	\$250.00	\$250.00	0.0%
Col of Design	Graduate Design 1 (Chicago)	Travel Lodging/Transport	Flat	\$525.00	\$525.00	0.0%
Col of Design	Graduate Design III	Consumable Materials	Flat	\$50.00	\$50.00	0.0%
Col of Design	Graduate Design V	multiple components	Flat	\$400.00	\$400.00	0.0%
Col of Design	Landscape Analysis Workshop	Travel/Lodging/Transport	Flat	\$400.00	\$400.00	0.0%
Col of Design	Landscape Spaces	multiple components	Flat	\$275.00	\$100.00	-63.6%
Col of Design	Materials and Methods I	Consumable Materials	Flat	\$50.00	\$40.00	-20.0%
Col of Design	Product Design Studio 1	Consumable Materials	Flat	\$25.00	\$50.00	100.0%
Col of Design	Product Form and Modelmaking	Consumable Materials	Flat	\$25.00	\$25.00	0.0%
Col of Design	Shoe Design	Consumable Materials	Flat		\$25.00	new
Col of Design	Text & Image	multiple components	Flat	\$70.00	\$20.00	-71.4%
Col of Design	Undergrad Studio I	Consumable Materials	Flat	\$40.00	\$40.00	0.0%
Col of Design	Undergrad Studio II	Consumable Materials	Flat	\$40.00	\$40.00	0.0%
Col of Design	Undergrad Studio III	multiple components	Flat	\$50.00	\$50.00	0.0%
Col of Design	Undergrad Studio V	Consumable Materials	Flat	\$40.00	\$40.00	0.0%
Col of Design	Urban Form Concepts	Travel/Lodging/Transport	Flat	\$370.00	\$250.00	-32.4%
Col of Design	Urban Options Studio	Travel/Lodging/Transport	Flat	\$370.00	\$400.00	8.1%
Col of Design	Wearable Technology Laboratory Practicum	Consumable Materials	Flat		\$25.00	new
Col of Ed & Human Devel	Assessment Materials - Special Ed	Exam/Assessment	Flat	\$18.00	\$18.00	0.0%
Col of Ed & Human Devel	Assessment Materials for CSPP	Access/Rent/Usage/Own	Flat	\$35.00	\$35.00	0.0%
Col of Ed & Human Devel	Biomechanics Equipment	Access/Rent/Usage/Own	Flat	\$45.00	\$45.00	0.0%
Col of Ed & Human Devel	Bowling Fee	Access/Rent/Usage/Own	Flat	\$60.00	\$60.00	0.0%
Col of Ed & Human Devel	CEHD DLI-L Program (1 credit) - Current Cohort	Tuition	Flat	\$600.00	\$600.00	0.0%
Col of Ed & Human Devel	CEHD DLI-L Program (2 credits) - Current Cohort	Tuition	Flat	\$1,200.00	\$1,200.00	0.0%
Col of Ed & Human Devel	CEHD DLI-L Program (3 credits) - Current Cohort	Tuition	Flat	\$1,800.00	\$1,800.00	0.0%
Col of Ed & Human Devel	CEHD DLI-L Program (4 credits) - Current Cohort	Tuition	Flat	\$2,400.00	\$2,400.00	0.0%
Col of Ed & Human Devel	CEHD DLI-L Program (1 credit) - Incoming Cohort	Tuition	Flat	\$600.00	\$750.00	25.0%
Col of Ed & Human Devel	CEHD DLI-L Program (2 credits) - Incoming Cohort	Tuition	Flat	\$1,200.00	\$1,500.00	25.0%
Col of Ed & Human Devel	CEHD DLI-L Program (3 credits) - Incoming Cohort	Tuition	Flat	\$1,800.00	\$2,250.00	25.0%
Col of Ed & Human Devel	CEHD DLI-L Program (4 credits) - Incoming Cohort	Tuition	Flat	\$2,400.00	\$3,000.00	25.0%
Col of Ed & Human Devel	The Impact of the Olympic Games on Los Angeles	Travel/Lodging/Transport	Flat	\$3,173.00	\$3,173.00	0.0%
Col of Ed & Human Devel	Counselor Education Tevera Fee	Access/Rent/Usage/Own	Flat	\$225.00	\$225.00	0.0%
Col of Ed & Human Devel	Testing and Intervention Materials- EPSY 8812	Consumable Materials	Flat	\$65.00	\$65.00	0.0%
Col of Ed & Human Devel	CEHD MNGOT Program (2 credits) - Current Cohort	Tuition	Flat	\$1,200.00	\$1,200.00	0.0%
Col of Ed & Human Devel	CEHD MNGOT Program (3 credits) - Current Cohort	Tuition	Flat	\$1,800.00	\$1,800.00	0.0%
Col of Ed & Human Devel	CEHD MNGOT Program (4 credits) - Current Cohort	Tuition	Flat	\$2,400.00	\$2,400.00	0.0%
Col of Ed & Human Devel	CEHD MNGOT Program (1 credit) - Incoming Cohort	Tuition	Flat	\$600.00	\$750.00	25.0%
Col of Ed & Human Devel	CEHD MNGOT Program (2 credits) - Incoming Cohort	Tuition	Flat	\$1,200.00	\$1,500.00	25.0%
Col of Ed & Human Devel	CEHD MNGOT Program (3 credits) - Incoming Cohort	Tuition	Flat	\$1,800.00	\$2,250.00	25.0%
Col of Ed & Human Devel	CEHD MNGOT Program (4 credits) - Incoming Cohort	Tuition	Flat	\$2,400.00	\$3,000.00	25.0%
Col of Ed & Human Devel	CEHD PK-12 Administrative Licensure Cert (1 credit)	Tuition	Flat	\$680.00	\$750.00	10.3%
Col of Ed & Human Devel	CEHD PK-12 Administrative Licensure Cert (2 cr)	Tuition	Flat	\$1,360.00	\$1,500.00	10.3%
Col of Ed & Human Devel	CEHD PK-12 Administrative Licensure Cert (3 cr)	Tuition	Flat	\$2,040.00	\$2,250.00	10.3%
Col of Ed & Human Devel	CEHD PK-12 Administrative Licensure Cert (4 cr)	Tuition	Flat	\$2,720.00	\$3,000.00	10.3%
Col of Ed & Human Devel	CEHD Practitioner Prof Dev (3 credits)	Tuition	Flat	\$1,800.00	\$1,800.00	0.0%
Col of Ed & Human Devel	Concert Ticket Fee and Guest Artist	Consumable Materials	Flat	\$20.00	\$20.00	0.0%
Col of Ed & Human Devel	Exercise Physiology Equipment	Access/Rent/Usage/Own	Flat	\$115.00	\$115.00	0.0%
Col of Ed & Human Devel	Experiential Learning	Personnel	Flat	\$50.00	\$50.00	0.0%
Col of Ed & Human Devel	Golf Facilities Use Fee	Access/Rent/Usage/Own	Flat	\$100.00	\$100.00	0.0%
Col of Ed & Human Devel	Guest Artists-Creating Identities-Learning/Arts	Consumable Materials	Flat	\$26.00	\$27.00	3.8%
Col of Ed & Human Devel	Human Anatomy for Kinesiology Equipment & Lab	Access/Rent/Usage/Own	Flat	\$120.00	\$120.00	0.0%
Col of Ed & Human Devel	Human Physiology Equipment	Access/Rent/Usage/Own	Flat	\$45.00	\$45.00	0.0%
Col of Ed & Human Devel	Intermediate Golf Facilities Use Fee	Access/Rent/Usage/Own	Flat	\$125.00	\$125.00	0.0%
Col of Ed & Human Devel	Marathon Class Supplies and Testing Fees	Service	Flat	\$100.00	\$100.00	0.0%

**Attachment 6:
University of Minnesota 2024-2025 Course and Class Fees**

Campus/College	Fee Name	Dimension	Rate type	2024 Amount	2025 Amount	Percent Change
Col of Ed & Human Devel	PE Curling	Access/Rent/Usage/Own	Flat		\$125.00	new
Col of Ed & Human Devel	PE Equipment Tier 1	Access/Rent/Usage/Own	Flat	\$2.00	\$2.00	0.0%
Col of Ed & Human Devel	PE Equipment Fee Tier 2	Access/Rent/Usage/Own	Flat	\$5.00	\$5.00	0.0%
Col of Ed & Human Devel	PE Equipment Fee Tier 3	Access/Rent/Usage/Own	Flat	\$8.00	\$10.00	25.0%
Col of Ed & Human Devel	Rock Climbing Fee	Access/Rent/Usage/Own	Flat	\$65.00	\$65.00	0.0%
Col of Ed & Human Devel	Prevent Athletic Injuries Course Materials	Consumable Materials	Flat	\$20.00	\$20.00	0.0%
Col of Ed & Human Devel	School Psych Resource & Assessment Protocols	Access/Rent/Usage/Own	Flat	\$45.00	\$45.00	0.0%
Col of Ed & Human Devel	Scuba facilities	Access/Rent/Usage/Own	Flat	\$130.00	\$130.00	0.0%
Col of Ed & Human Devel	Skiing/Snowboarding	Access/Rent/Usage/Own	Flat	\$130.00	\$130.00	0.0%
Col of Ed & Human Devel	Social Work Fieldwork	Service	PerCredit	\$20.00	\$25.00	25.0%
Col of Ed & Human Devel	SW 8153 AHC Simulations	Service	Flat	\$185.00	\$190.00	2.7%
Col of Ed & Human Devel	Teaching Elem School PE	Access/Rent/Usage/Own	Flat	\$10.00	\$10.00	0.0%
Col of Ed & Human Devel	Testing/Intervention Materials	Access/Rent/Usage/Own	Flat	\$45.00	\$65.00	44.4%
Col of Ed & Human Devel	Youth Studies Theatre Activities	Access/Rent/Usage/Own	Flat	\$20.00	\$20.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	AECM 2051 Current Technical Competencies	Consumable Materials	Flat	\$50.00	\$50.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	AGRO 1101 Bio of Plant System	Consumable Materials	Flat	\$30.00	\$30.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	AGRO 3660 Plant Genetics Materials	Consumable Materials	Flat	\$10.00	\$10.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	ANSC 1101 Dairy Cattle	Access/Rent/Usage/Own	Flat	\$100.00	\$100.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	ANSC 2011 Dairy Cattle Judging	Travel/Lodging/Transport	Flat	\$110.00	\$110.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	ANSC 2012 - Swine/Sheep/Beef	multiple components	Flat	\$135.00	\$135.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	ANSC 3221 Animal Breeding	Access/Rent/Usage/Ownersh	Flat	\$25.00	\$25.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	ANSC 3303W Human and Animal Physiology	Consumable Materials	Flat	\$125.00	\$125.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	ANSC 4601 Pork Prod Systems Mgmt	multiple components	Flat	\$125.00	\$125.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	ANSC 4602 - Sheep Production Systems	multiple components	Flat	\$150.00	\$150.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	ANSC 4603 and ANSC 4613 Beef Prod Systems	Travel/Lodging/Transport	Flat	\$100.00	\$100.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	ANSC 4604; ANSC 4614 Dairy Production Systems	Travel/Lodging/Transport	Flat	\$75.00	\$75.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	ANSC 8520 Comparative Animal Genomics	Consumable Materials	Flat	\$100.00	\$100.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	ANSC2012 Livestock & Carcass Evaluation	Access/Rent/Usage/Own	Flat	\$125.00	\$125.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	ANSC3509 Animal Biotechnology	Consumable Materials	Flat	\$70.00	\$70.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	BBE 1001 Orientation	Travel/Lodging/Transport	Flat	\$15.00	\$79.00	426.7%
Col of Food,Ag & Nat Rsrc Sci	BBE 3013 Eng Prin Cell Proc	Consumable Materials	Flat	\$80.00	\$75.00	-6.3%
Col of Food,Ag & Nat Rsrc Sci	BBE 3023 Ecological Eng Principles	Consumable Materials	Flat	\$20.00	\$20.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	BBE 4402 / 5402 Eng Lab	Consumable Materials	Flat	\$25.00	\$25.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	BBE 4403 / 5403 Bioproducts & Biosystems Eng	Consumable Materials	Flat	\$25.00	\$25.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	BBE 4533 Sustainable Waste Mgmt Engr	Consumable Materials	Flat	\$60.00	\$60.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	BBE 4535 / 5535	Consumable Materials	Flat	\$20.00	\$20.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	Crops, Environment, & Society	Consumable Materials	Flat	\$10.00	\$10.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	ENT 1005 Insect Biology	Consumable Materials	Flat	\$10.00	\$10.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	ENT 3021/5021, Insect Biodiversity and Evolution	Consumable Materials	Flat		\$20.00	new
Col of Food,Ag & Nat Rsrc Sci	ESPM 2021 Env Sci: Integrated Problem Solving	Travel/Lodging/Transport	Flat	\$11.00	\$11.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	ESPM 3111 / ESPM 5111	multiple components	Flat	\$75.00	\$75.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	ESPM 3221 Soil Conservation & Land Use Mgmt	Consumable Materials	Flat	\$30.00	\$30.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	ESPM 4041W Prob Solving/Environmental Change	Consumable Materials	Flat	\$25.00	\$25.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	FDSY 1016W Urban Ag in the Twin Cities	multiple components	Flat	\$40.00	\$40.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	FDSY 2102: Diversity/Agricultural Production Syst	Travel/Lodging/Transport	Flat	\$100.00	\$100.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	FNRM 1001 Orientation & Information Systems	Travel/Lodging/Transport	Flat	\$109.00	\$127.00	16.5%
Col of Food,Ag & Nat Rsrc Sci	FNRM 2101; FNRM 5161 Cloquet Forestry Center	Travel/Lodging/Transport	Flat	\$80.00	\$80.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	FNRM 2102 Field Ecology Equipment	multiple components	Flat	\$284.00	\$300.00	5.6%
Col of Food,Ag & Nat Rsrc Sci	FNRM 3104 / 5104 Forest Ecology	Consumable Materials	Flat	\$17.00	\$43.00	152.9%
Col of Food,Ag & Nat Rsrc Sci	FNRM 3206; FNRM 5206 Parks & Protected Mgmt	multiple components	Flat	\$717.00	\$838.00	16.9%
Col of Food,Ag & Nat Rsrc Sci	FNRM 4232W; FNRM 5232 Mng Recreational Lands	Travel/Lodging/Transport	Flat	\$20.00	\$20.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	FNRM 4511 Field Silviculture	Travel/Lodging/Transport	Flat	\$77.00	\$77.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	FNRM 4511; FNRM 5511 Field Silviculture	multiple components	Flat	\$279.00	\$296.00	6.1%
Col of Food,Ag & Nat Rsrc Sci	FNRM 4515 / lodging at Cloquet Forestry Center	Travel/Lodging/Transport	Flat	\$38.00	\$38.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	FNRM 4515 Field Resouce Survey	Travel/Lodging/Transport	Flat	\$139.00	\$147.00	5.8%
Col of Food,Ag & Nat Rsrc Sci	FNRM 5161 Northern Forest Field Course	multiple components	Flat	\$900.00	\$1,014.00	12.7%
Col of Food,Ag & Nat Rsrc Sci	FNRM 5161 Northern Forests Field Course /Cloquet	Travel/Lodging/Transport	Flat	\$238.00	\$243.00	2.1%
Col of Food,Ag & Nat Rsrc Sci	FNRM 5413 Managing for Ecosystems: Silviculture	multiple components	Flat	\$54.00	\$58.00	7.4%
Col of Food,Ag & Nat Rsrc Sci	FNRM Northern Forests Field Ecology	multiple components	Flat	\$300.00	\$338.00	12.7%
Col of Food,Ag & Nat Rsrc Sci	FSCN 1011 Science of Food & Cooking	Consumable Materials	Flat	\$20.00	\$20.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	FSCN 2001 / Food Systems Approach	Consumable Materials	Flat	\$75.00	\$50.00	-33.3%
Col of Food,Ag & Nat Rsrc Sci	FSCN 2021 Introductory Microbiology	Consumable Materials	Flat	\$74.00	\$74.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	FSCN 3102	Consumable Materials	Flat	\$25.00	\$25.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	FSCN 4121 Food Microbiology	Consumable Materials	Flat	\$100.00	\$100.00	0.0%

**Attachment 6:
University of Minnesota 2024-2025 Course and Class Fees**

Campus/College	Fee Name	Dimension	Rate type	2024 Amount	2025 Amount	Percent Change
Col of Food,Ag & Nat Rsrc Sci	FSCN 4332: Food Processing Operations	Consumable Materials	Flat	\$10.00	\$10.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	FSCN 4349 Food Science Capstone	Consumable Materials	Flat	\$75.00	\$75.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	FSCN 4481 Sensory Eval of Food Quality	Consumable Materials	Flat	\$30.00	\$30.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	FSCN 4613 Experimental Nutrition	multiple components	Flat	\$100.00	\$100.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	FSCN 5312 Food Analysis	multiple components	Flat	\$85.00	\$85.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	FSCN Food Science Materials & Services	Consumable Materials	Flat	\$15.00	\$15.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	FSDY 4101: Holistic Approach/Food System Sustain	multiple components	Flat	\$35.00	\$35.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	FW 3108 Res/Conservation Vertebrate Populations	Travel/Lodging/Transport	Flat	\$628.00	\$450.00	-28.3%
Col of Food,Ag & Nat Rsrc Sci	FW 4136 Ichthyology	Travel/Lodging/Transport	Flat	\$30.00	\$38.00	26.7%
Col of Food,Ag & Nat Rsrc Sci	HORT 1001; HORT 6011 Plant Propogation	Consumable Materials	Flat	\$35.00	\$40.00	14.3%
Col of Food,Ag & Nat Rsrc Sci	HORT 1031 Vines & Wines	Consumable Materials	Flat	\$80.00	\$80.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	HORT 3131/5131 Student Organic Farming	multiple components	Flat	\$20.00	\$20.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	HORT 4015 / 4141W / 5071	Consumable Materials	Flat	\$55.00	\$55.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	PLSC 3401, Plant Genetics and Breeding	Consumable Materials	Flat		\$15.00	new
Col of Food,Ag & Nat Rsrc Sci	SOIL 4511 - Field Study of Soils	Travel/Lodging/Transport	Flat	\$145.00	\$145.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	SOIL 4511 Sec 001 Field Study of Soils	Travel/Lodging/Transport	Flat	\$307.00	\$307.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	SSM 1004 Orientation	Travel/Lodging/Transport	Flat	\$65.00	\$65.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	SSM Sustainable Manufacturing	multiple components	Flat	\$60.00	\$60.00	0.0%
Col of Food,Ag & Nat Rsrc Sci	SUST 4004 Sustainable Communities	Travel/Lodging/Transport	Flat	\$90.00	\$45.00	-50.0%
Col of Liberal Arts	3401 Spanish - Latino Immigration	multiple components	Flat	\$25.00	\$25.00	0.0%
Col of Liberal Arts	ANTH 1001/1001H Human Evolution	Consumable Materials	Flat		\$15.00	new
Col of Liberal Arts	ANTH 3/5008 Flintknapping	Consumable Materials	Flat		\$60.00	new
Col of Liberal Arts	ANTH 3001 Introduction to Archaeology	access/Rent/Usage/Own	Flat		\$20.00	new
Col of Liberal Arts	ANTH 3002 Sex, Evolution, and Behavior	access/Rent/Usage/Own	Flat		\$20.00	new
Col of Liberal Arts	ANTH 3402/5402 Zooarchaeology	Consumable Materials	Flat		\$25.00	new
Col of Liberal Arts	ANTH 3405/5405 Human Skeletal Analysis	Access/Rent/Usage/Own	Flat		\$20.00	new
Col of Liberal Arts	ANTH 3501/5501 Managing Museum Collections	Consumable Materials	Flat		\$30.00	new
Col of Liberal Arts	ANTH 4007 Laboratory Techniques in Archaeology	Consumable Materials	Flat		\$35.00	new
Col of Liberal Arts	Anthropology-Archaeology Field School - Summmer	multiple components	Flat	\$72.00	\$72.00	0.0%
Col of Liberal Arts	ART - 3D Modeling	multiple components	Flat	\$110.00	\$95.00	-13.6%
Col of Liberal Arts	ART - Adv Photogrraphy/Moving Image Projects	multiple components	Flat	\$55.00	\$90.00	63.6%
Col of Liberal Arts	ART - Advanced Drawing	multiple components	Flat	\$50.00	\$80.00	60.0%
Col of Liberal Arts	ART - Animation	multiple components	Flat	\$55.00	\$60.00	9.1%
Col of Liberal Arts	ART - Art & Live	multiple components	Flat	\$10.00	\$51.00	410.0%
Col of Liberal Arts	ART - BFA Capstone	Personnel	Flat	\$25.00	\$40.00	60.0%
Col of Liberal Arts	ART - Ceramics Tier 1	multiple components	Flat	\$110.00	\$126.00	14.5%
Col of Liberal Arts	ART - Ceramics Tier 2	multiple components	Flat	\$170.00	\$191.00	12.4%
Col of Liberal Arts	ART - Critical Theories	multiple components	Flat	\$25.00	\$35.00	40.0%
Col of Liberal Arts	ART - Curatorial Practices	Personnel	Flat		\$50.00	new
Col of Liberal Arts	ART - Digital Drawing	multiple components	Flat	\$70.00	\$85.00	21.4%
Col of Liberal Arts	ART - Dimensional Painting	multiple components	Flat	\$45.00	\$55.00	22.2%
Col of Liberal Arts	ART - DPP Zines, Comics and books	multiple components	Flat	\$135.00	\$181.00	34.1%
Col of Liberal Arts	ART - Drawing Tier 2	multiple components	Flat	\$55.00	\$50.00	-9.1%
Col of Liberal Arts	ART - Drawing Tier 1	multiple components	Flat	\$60.00	\$158.50	164.2%
Col of Liberal Arts	ART - Exhibition Fee	Consumable Materials	Variable	\$2.00 - \$350.00	\$2.00 - \$350.00	0.0%
Col of Liberal Arts	Art - Extended Image	multiple components	Flat	\$82.00	\$125.00	0.0%
Col of Liberal Arts	ART - Filmmaking	multiple components	Flat	\$110.00	\$135.00	0.0%
Col of Liberal Arts	ART - Grad Practice, thesis/theoretical construct	Personnel	Flat	\$25.00	\$50.00	100.0%
Col of Liberal Arts	ART - IASP Art and Ecology	multiple components	Flat	\$45.00	\$59.00	31.1%
Col of Liberal Arts	ART - Intro to Moving Images	multiple components	Flat	\$55.00	\$75.00	36.4%
Col of Liberal Arts	ART - MFA Studio & Creative Thesis	Consumable Materials	PerCredit	\$25.00	\$25.00	0.0%
Col of Liberal Arts	ART - Narrative & Experimental Filmmaking	multiple components	Flat	\$55.00	\$75.00	36.4%
Col of Liberal Arts	ART - Nash Gallery Exhibition	Access/Rent/Usage/Own	Flat	\$5.00	\$5.00	0.0%
Col of Liberal Arts	ART - Painting Tier 1	multiple components	Flat	\$60.00	\$225.00	275.0%
Col of Liberal Arts	ART - Painting Tier 2	multiple components	Flat	\$55.00	\$50.00	-9.1%
Col of Liberal Arts	ART - Phone It In	multiple components	Flat		\$40.00	new
Col of Liberal Arts	ART - Photography - Tier 1	multiple components	Flat	\$82.00	\$77.00	-6.1%
Col of Liberal Arts	ART - Photography - Tier 2	multiple components	Flat	\$105.00	\$137.00	30.5%
Col of Liberal Arts	ART - PMI Tier 4	multiple components	Flat	\$142.00	\$155.00	9.2%
Col of Liberal Arts	ART - Printmaking Tier 1	multiple components	Flat	\$110.00	\$140.00	27.3%
Col of Liberal Arts	ART - Printmaking Tier 2	multiple components	Flat	\$120.00	\$141.00	17.5%
Col of Liberal Arts	ART - Professional practices in art	multiple components	Flat	\$35.00	\$50.00	42.9%
Col of Liberal Arts	ART - Sculpture - Tier 1	multiple components	Flat	\$101.00	\$109.00	7.9%
Col of Liberal Arts	ART - Sculpture - Tier 3	multiple components	Flat	\$145.00	\$146.00	0.7%

**Attachment 6:
University of Minnesota 2024-2025 Course and Class Fees**

Campus/College	Fee Name	Dimension	Rate type	2024 Amount	2025 Amount	Percent Change
Col of Liberal Arts	ART - Sculpture - Tier 4	multiple components	Flat	\$195.00	\$203.00	4.1%
Col of Liberal Arts	ART - Sculpture - Tier 4	Access/Rent/Usage/Own	Flat	\$2.00 - \$350.00	\$2.00 - \$350.00	0.0%
Col of Liberal Arts	ART - Studio Arts	multiple components	Flat	\$10.00	\$10.00	0.0%
Col of Liberal Arts	ART - Studio Critique Guest Artist Fee	Personnel	Flat	\$50.00	\$50.00	0.0%
Col of Liberal Arts	ART - Studio Perspective Critical Theories	Personnel	Flat	\$10.00	\$10.00	0.0%
Col of Liberal Arts	ART - Watercolor painting	multiple components	Flat	\$55.00	\$80.00	45.5%
Col of Liberal Arts	ART DPP advanced painting	multiple components	Flat	\$50.00	\$78.00	56.0%
Col of Liberal Arts	ART DPP Figure Drawing	multiple components	Flat	\$70.00	\$95.00	35.7%
Col of Liberal Arts	BA Studio Series	Consumable Materials	Flat		\$35.00	new
Col of Liberal Arts	Comm Studies - Tier 1	Consumable Materials	Flat	\$5.00	\$5.00	0.0%
Col of Liberal Arts	Comm Studies - Tier 2	Consumable Materials	Flat	\$10.00	\$10.00	0.0%
Col of Liberal Arts	Dance - Survival Strategies in Dance	Service	Flat	\$100.00	\$100.00	0.0%
Col of Liberal Arts	Dance Accompanist	Personnel	Flat	\$110.00	\$110.00	0.0%
Col of Liberal Arts	Dance Accompanist Tier 3	Personnel	Flat	\$90.00	\$90.00	0.0%
Col of Liberal Arts	HSJMC Adobe Licensing Fee - Tier 1	Access/Rent/Usage/Own	flat	\$65.00	\$65.00	0.0%
Col of Liberal Arts	Journalism/Mass Communications Digital Lab	Consumable Materials	Flat	\$25.00	\$25.00	0.0%
Col of Liberal Arts	Latino Immigration on the US/Mexican Border	Travel/Lodging/Transport	Flat	\$1,355.00	\$1,400.00	3.3%
Col of Liberal Arts	Marching/Pep Band - Program	Program	Flat	\$200.00	\$200.00	0.0%
Col of Liberal Arts	Music - Applied Music Lessons - Elective	Individual Instruction	PerCredit	\$209.00	\$217.50	4.1%
Col of Liberal Arts	Music - Applied Music Lessons - Majors	Individual Instruction	PerCredit	\$121.00	\$141.00	16.5%
Col of Liberal Arts	Music - Applied Music Lessons - Music Education	Individual Instruction	PerCredit	\$121.00	\$141.00	16.5%
Col of Liberal Arts	Music - Applied Music Lessons - Secondary	Individual Instruction	PerCredit	\$121.00	\$141.00	16.5%
Col of Liberal Arts	Music - Piano Course Fee	Access/Rent/Usage/Own	Flat	\$46.00	\$46.00	0.0%
Col of Liberal Arts	Music Education - Brass	Access/Rent/Usage/Own	Flat	\$56.00	\$60.00	7.1%
Col of Liberal Arts	Music Education - Strings	Access/Rent/Usage/Own	Flat	\$47.00	\$54.00	14.9%
Col of Liberal Arts	Music Education - Woodwinds	Access/Rent/Usage/Own	Flat	\$138.00	\$121.00	-12.3%
Col of Liberal Arts	Music for Dance - Specialty Accompanist	Personnel	Flat	\$40.00	\$40.00	0.0%
Col of Liberal Arts	Music Scores for Ensembles	multiple components	Flat	\$26.00	\$26.00	0.0%
Col of Liberal Arts	Political Science Poster Printing	Access/Rent/Usage/Own	Flat	\$5.00	\$5.00	0.0%
Col of Liberal Arts	SLHS - Clinical Education	multiple components	PerCredit	\$17.00	\$17.00	0.0%
Col of Liberal Arts	Theatre Arts - Accompanist - Tier 1	Personnel	Flat	\$100.00	\$100.00	0.0%
Col of Liberal Arts	Theatre Arts - BFA Collaboration	multiple components	Flat	\$150.00	\$150.00	0.0%
Col of Liberal Arts	Theatre Arts - Circus	Consumable Materials	Flat	\$35.00	\$35.00	0.0%
Col of Liberal Arts	Theatre Arts - Costume	Consumable Materials	Flat	\$200.00	\$200.00	0.0%
Col of Liberal Arts	Theatre Arts - Design & Tech	Consumable Materials	Flat	\$15.00	\$15.00	0.0%
Col of Liberal Arts	Theatre Arts - Makeup	Consumable Materials	Flat	\$90.00	\$120.00	33.3%
Col of Liberal Arts	Theatre Arts - Performance Ticket Fee (Artshare)	Travel/Lodging/Transport	Flat	\$30.00	\$30.00	0.0%
Col of Liberal Arts	Theatre Arts - Performance Ticket Fee (Various)	Travel/Lodging/Transport	Flat	\$75.00	\$150.00	100.0%
Col of Liberal Arts	Theatre Arts - Stage Materials	Consumable Materials	Flat	\$75.00	\$75.00	0.0%
Col of Liberal Arts	Theatre Arts - Stage Technology	Access/Rent/Usage/Own	Flat	\$35.00	\$35.00	0.0%
Col of Pharmacy	5112 Application of Diagnostic Micr Principles-TC	Consumable Materials	Flat	\$255.00	\$255.00	0.0%
Col of Pharmacy	5212 App of Hematology/Hemostasis Principles TC	Consumable Materials	Flat	\$74.00	\$76.00	2.7%
Col of Pharmacy	5311-Fundamental Biomedical Lab Techniques - TC	Consumable Materials	Flat	\$242.00	\$242.00	0.0%
Col of Pharmacy	5312 Body Fluid Analysis TC	Consumable Materials	Flat	\$131.00	\$131.00	0.0%
Col of Pharmacy	5514 Application of Transfusion Medicine Princ TC	Consumable Materials	Flat	\$192.00	\$192.00	0.0%
Col of Pharmacy	Microscope Fee I	Access/Rent/Usage/Own	Flat	\$27.00	\$27.00	0.0%
Col of Pharmacy	Microscope Fee II	Access/Rent/Usage/Own	Flat	\$54.00	\$54.00	0.0%
Col of Pharmacy	Molecular Fees MLSP 6402	Consumable Materials	Flat	\$205.00	\$205.00	0.0%
Col of Sci & Engineering	CEMS Lab Fe CHEN 3401	Consumable Materials	Flat	\$20.00	\$20.00	0.0%
Col of Sci & Engineering	CEMS Lab Fee CHEN 4401	Consumable Materials	Flat	\$40.00	\$40.00	0.0%
Col of Sci & Engineering	CHEN 4223W - Polymer Chemistry Lab Fee	Consumable Materials	Flat	\$122.00	\$122.00	0.0%
Col of Sci & Engineering	Aerospace Vehicle Design	Consumable Materials	Flat	\$25.00	\$25.00	0.0%
Col of Sci & Engineering	Aerospace Design Problems	Consumable Materials	Flat	\$150.00	\$150.00	0.0%
Col of Sci & Engineering	Biomed Engineering Lab 2	Consumable Materials	Flat	\$30.00	\$30.00	0.0%
Col of Sci & Engineering	Biomed Engineering Lab 5	Consumable Materials	Flat	\$17.50	\$17.00	-2.9%
Col of Sci & Engineering	Biomed Engineering Lab 6	Consumable Materials	Flat	\$55.00	\$55.00	0.0%
Col of Sci & Engineering	CHEM 1017 - Chemistry Lab Fee	Consumable Materials	Flat	\$37.00	\$34.00	-8.1%
Col of Sci & Engineering	CHEM 1065 - Chemistry Lab Fee	Consumable Materials	Flat	\$33.00	\$34.00	3.0%
Col of Sci & Engineering	CHEM 1066 - Chemistry Lab Fee	Consumable Materials	Flat	\$33.00	\$35.00	6.1%
Col of Sci & Engineering	CHEM 4111W - Chemistry Lab Fee	Consumable Materials	Flat	\$133.00	\$102.00	-23.3%
Col of Sci & Engineering	CHEM 2311 - Chemistry Lab Fee	Consumable Materials	Flat	\$105.00	\$108.00	2.9%
Col of Sci & Engineering	CHEM 4311W - Chemistry Lab Fee	Consumable Materials	Flat	\$347.00	\$229.00	-34.0%
Col of Sci & Engineering	CHEM 2312H - Chemistry Lab Fee	Consumable Materials	Flat	\$429.00	\$438.00	2.1%

**Attachment 6:
University of Minnesota 2024-2025 Course and Class Fees**

Campus/College	Fee Name	Dimension	Rate type	2024 Amount	2025 Amount	Percent Change
Col of Sci & Engineering	CHEM 4711W - Chemistry Lab Fee	Consumable Materials	Flat	\$206.00	\$56.00	-72.8%
Col of Sci & Engineering	ESCI 2203 Lab	multiple components	Flat	\$57.00	\$57.00	0.0%
Col of Sci & Engineering	ESCI 4702 General Hydro	Travel/Lodging/Transport	Flat	\$96.00	\$96.00	0.0%
Col of Sci & Engineering	ESCI 4911 Field Camp Advanced	Travel/Lodging/Transport	Flat	\$1,200.00	\$1,200.00	0.0%
Col of Sci & Engineering	ESCI 4971W/5971 Field Camp Hydrogeo	Travel/Lodging/Transport	Flat	\$1,000.00	\$1,000.00	0.0%
Col of Sci & Engineering	ESCI 3911 Field Camp Intro	Travel/Lodging/Transport	Flat	\$1,400.00	\$1,400.00	0.0%
Col of Sci & Engineering	CEMS Lab Fee MATS 2002	Consumable Materials	Flat	\$25.00	\$25.00	0.0%
Col of Sci & Engineering	CEMS Lab Fee MATS 4221	Access/Rent/Usage/Own	Flat	\$50.00	\$50.00	0.0%
Col of Sci & Engineering	MATS 4223 - Polymer Chemistry Lab Fee	Consumable Materials	Flat	\$122.00	\$122.00	0.0%
Col of Sci & Engineering	CEMS Lab Fee MATS 3851	Access/Rent/Usage/Own	Flat	\$100.00	\$100.00	0.0%
Col of Sci & Engineering	CEMS Lab Fee MATS 3801	Access/Rent/Usage/Own	Flat	\$200.00	\$220.00	10.0%
Col of Sci & Engineering	ME2011 - Robot Course	Consumable Materials	Flat	\$35.00	\$35.00	0.0%
Col of Sci & Engineering	CEGE 1501 - Environmental Issues & Solutions	Consumable Materials	Flat	\$40.00	\$38.00	-5.0%
Col of Sci & Engineering	TLI MOT - IMTP Study Abroad Fee	Travel/Lodging/Transport	Flat	\$2,100.00	\$2,100.00	0.0%
Col of Sci & Engineering	Biomedical Engineering Tissue Engineering Crse 8	Consumable Materials	Flat	\$100.00	\$100.00	0.0%
Col of Sci & Engineering	ESCI 4703 Glacial Field Trips	Travel/Lodging/Transport	Flat	\$103.00	\$103.00	0.0%
Col of Sci & Engineering	ME 3221 - Design & Manufacturing	Consumable Materials	Flat	\$40.00	\$40.00	0.0%
Col of Sci & Engineering	CHEM 4423 - Chemistry Chem Bio Lab Fee	Consumable Materials	Flat	\$290.00	\$144.00	-50.3%
Col of Sci & Engineering	EE 2015 - Signals, Curcuits, & Electronics I	Consumable Materials	Flat	\$82.00	\$84.00	2.4%
Col of Sci & Engineering	EE 3006 - Fundamentals of Elec Engineering Lab	Consumable Materials	Flat	\$74.00	\$76.00	2.7%
Col of Sci & Engineering	EE 2301 - Introduction to Digital System Design	Consumable Materials	Flat	\$136.00	\$137.00	0.7%
Col of Sci & Engineering	EE 2361 - Introduction to Microcontrollers	Consumable Materials	Flat	\$81.00	\$78.00	-3.7%
Col of Sci & Engineering	CEGE 3402W Civil Engineering Materials	Consumable Materials	Flat	\$33.00	\$58.00	75.8%
Col of Sci & Engineering	EE 1301 - Introduction to Computing Systems	Consumable Materials	Flat	\$91.00	\$97.00	6.6%
Col of Sci & Engineering	ESCI 4701, Geomorphology	Travel/Lodging/Transport	Flat	\$113.00	\$113.00	0.0%
Col of Sci & Engineering	CHEM 1086 - Life Sciences II Chemistry Lab Fee	Consumable Materials	Flat	\$53.00	\$48.00	-9.4%
Col of Sci & Engineering	Biomed Engineering Course 9	multiple components	Flat	\$100.00	\$100.00	0.0%
Col of Sci & Engineering	Biomed Engineering Course 10	Consumable Materials	Flat	\$33.00	\$33.00	0.0%
Col of Sci & Engineering	CHEM 2085 - Chemistry Lab Fee	Consumable Materials	Flat	\$65.00	\$60.00	-7.7%
Col of Sci & Engineering	Biomed Engineering Course 11	Consumable Materials	Flat	\$100.00	\$100.00	0.0%
Col of Sci & Engineering	ESCI 1902 - wild rice	Travel/Lodging/Transport	Flat	\$134.00	\$134.00	0.0%
Col of Sci & Engineering	EE 2115 - Analog and Digital Electronics	Consumable Materials	Flat	\$15.00	\$17.00	13.3%
Col of Sci & Engineering	EE 3102/EE3951W - Circ/ Elec Lab II/Junior Design	Consumable Materials	Flat	\$23.00	\$22.00	-4.3%
Col of Sci & Engineering	CHEM 3111 - Chemistry Lab (formerly CHEM 2111)	Consumable Materials	Flat	\$57.00	\$56.00	-1.8%
Col of Sci & Engineering	ME 4054W - Design Projects	Consumable Materials	Flat	\$30.00	\$25.00	-16.7%
Col of Sci & Engineering	ME 3222 - Design and Manufacturing II	Consumable Materials	Flat	\$20.00	\$20.00	0.0%
Col of Sci & Engineering	BMEN 3115: Biomedical Transport Processes Lab	Consumable Materials	Flat	\$10.00	\$13.00	30.0%
Col of Sci & Engineering	ESCI 5353 Electron Microscopy	Access/Rent/Usage/Own	Flat		\$600.00	new
Col of Sci & Engineering	MATS 4301W Materials Processing	Consumable Materials	Flat		\$50.00	new
Col of Sci & Engineering	CHEM 1065/1066/1076H	Access/Rent/Usage/Own	Flat		\$24.75	new
Col of Veterinary Med	Companion Animal Anatomy Lab Fee	Consumable Materials	Flat	\$56.00	\$56.00	0.0%
Col of Veterinary Med	General Microbiology	Consumable Materials	Flat	\$90.00	\$90.00	0.0%
Col of Veterinary Med	Veterinary & Biomedical Services Lab Fee	Consumable Materials	Flat	\$100.00	\$90.00	-10.0%
Medical School	ANAT5999/7999 Head and Neck	Consumable Materials	Flat	\$8.00	\$8.00	0.0%
Medical School	ANAT6050 Gross Dental Anatomy	Consumable Materials	Flat	\$8.00	\$8.00	0.0%
Medical School	Human Anat Labs: Anat3602/Anat3612/Anat3608H	Consumable Materials	Flat	\$25.00	\$25.00	0.0%
Medical School	INMD 6801 - Human Struc/Func (Histology lab fee)	Consumable Materials	Flat	\$50.00	\$50.00	0.0%
Medical School	MNMD 6200 Neuroscience	Consumable Materials	Flat	\$50.00	\$50.00	0.0%
Medical School	INMD6820 Gross Anatomy	Consumable Materials	Flat	\$8.00	\$8.00	0.0%
Medical School	MED 6566 - Cardiovascular System (Duluth)	Consumable Materials	Flat	\$25.00	\$25.00	0.0%
Medical School	MED 6728 - Respiratory System (Duluth)	Consumable Materials	Flat	\$25.00	\$25.00	0.0%
Medical School	MED 6788 - Skin/Musculoskeletal (Duluth)	Consumable Materials	Flat	\$40.00	\$40.00	0.0%
Medical School	MICB - Lab Supplies/Services	Consumable Materials	Flat	\$88.00	\$88.00	0.0%
Medical School	MORT 3151 - RA Lab	Consumable Materials	Flat	\$60.00	\$60.00	0.0%
Medical School	MORT 3161 - Embalming Laboratory	Consumable Materials	Flat	\$250.00	\$250.00	0.0%
Medical School	MORT 3171 - Human Anatomy	Consumable Materials	Flat	\$40.00	\$40.00	0.0%
Medical School	MORT 3379 - Clinical Rotation	Consumable Materials	Flat	\$45.00	\$45.00	0.0%
Medical School	NSCI 1100 Human Neuroanatomy	Consumable Materials	Flat	\$82.00	\$82.00	0.0%
Medical School	NSCI 5111 Medical Neuroscience	Consumable Materials	Flat	\$50.00	\$50.00	0.0%
Medical School	NSCI 6112 Medical Neuroscience	Consumable Materials	Flat	\$50.00	\$50.00	0.0%
Medical School	Pelvis & Urinary Symptoms	Consumable Materials	Flat	\$326.00	\$326.00	0.0%
Medical School	PHCL 4100-Lab Fee	Consumable Materials	Flat	\$100.00	\$100.00	0.0%

**Attachment 6:
University of Minnesota 2024-2025 Course and Class Fees**

Campus/College	Fee Name	Dimension	Rate type	2024 Amount	2025 Amount	Percent Change
Medical School	PHSL 5510 Advanced Cardiac Physiology	Consumable Materials	Flat	\$525.00	\$525.00	0.0%
Medical School	PHSL3051 Human Physiology	Consumable Materials	Flat	\$10.00	\$10.00	0.0%
Medical School	PHSL3701 Physiology Lab	Consumable Materials	Flat	\$35.00	\$30.00	-14.3%
Schl of Dentistry	Oral Anatomy -Manual and Supplies	Access/Rent/Usage/Own	Flat	\$89.00	\$89.00	0.0%
Schl of Dentistry	Pros Lab V Partial Dentures	Consumable Materials	Flat	\$278.00	\$292.00	5.0%
Schl of Dentistry	Operative Dentistry I	Consumable Materials	Flat	\$409.00	\$838.00	104.9%
Schl of Dentistry	Operative Dentistry II & III	Consumable Materials	Flat	\$310.00	\$310.00	0.0%
Schl of Dentistry	DDS 6492 Pros Tech Lab VI- Implants	Consumable Materials	Flat	\$412.00	\$473.00	14.8%
Schl of Dentistry	DDS 6472 Pre-Clinical Pros Lab II	Access/Rent/Usage/Own	Flat	\$200.00	\$312.00	56.0%
Schl of Dentistry	Endo Typodonts - DDS and PASS	Consumable Materials	Flat	\$550.00	\$794.00	44.4%
Schl of Dentistry	DDS 6485 Pros Tech lab Fee PASS	Consumable Materials	Flat	\$232.00	\$1,093.00	371.1%
Schl of Dentistry	PASS-DDS 6485Preclinic Inst- Panadent/ Articulator	Consumable Materials		\$200.00	\$213.00	6.5%
Schl of Dentistry	DDS4 Advanced Practice Management Simulation	Access/Rent/Usage/Own	Flat	\$38.00	\$38.00	0.0%
Schl of Dentistry	Intro to Clinical Dentistry PASS (DDS6130)	Consumable Materials	Flat	\$1,093.00	\$1,093.00	0.0%
Schl of Dentistry	Pros topics in Dental Therapy (DT 5471)	Consumable Materials	Flat	\$160.00	\$160.00	0.0%
Schl of Dentistry	Drake P3 Personality Profile	Consumable Materials	Flat	\$17.00	\$17.00	0.0%
Schl of Dentistry	Dental Practice Readines DDS 1,2,3,4	Access/Rent/Usage/Own	Flat	\$80.00	\$80.00	0.0%
Schl of Dentistry	Dental Practice Readines DT2	Access/Rent/Usage/Own	Flat	\$44.00	\$44.00	0.0%
Schl of Dentistry	Operative Dentistry (DDS 6438)	Consumable Materials	Flat	\$293.00	\$434.00	48.1%
Schl of Dentistry	Clinical Occlusion DDS 6479	Consumable Materials	Flat		\$205.00	new
Schl of Dentistry	DDS 6487 PASS Pros 2	Consumable Materials	Flat		\$1,093.00	new
Schl of Dentistry	Preclin Pros Tech Lab I (Fixed Pros I DDS 6469)	Consumable Materials	Flat		\$423.00	new
Schl of Dentistry	Preclin Pros Tech Lab III (Fixed Pros III DDS 6474)	Consumable Materials	Flat		\$496.00	new
Schl of Nursing	Global Health through Study Abroad - Iceland	Travel/Lodging/Transport	Flat	\$831.00	\$1,083.00	30.3%
Schl of Nursing	Global Health/Study Abroad - Cuba	Travel/Lodging/Transport	Flat	\$997.00	\$912.00	-8.5%
Schl of Nursing	Global Health/Study Abroad - Guatemala clinical	Travel/Lodging/Transport	Flat	\$175.00	\$542.00	209.7%
Schl of Nursing	Global Health/Study Abroad - Vietnam	Travel/Lodging/Transport	Flat	\$1,533.00	\$1,525.00	-0.5%
Schl of Nursing	Global Health/ Study Abroad - Malawi	Travel/Lodging/Transport	Flat	\$888.00	\$1,928.00	117.1%
Schl of Nursing	Global Health/ Study Abroad - United Nations	Travel/Lodging/Transport	Flat		\$746.00	new
Schl of Nursing	Group Health Coaching Sessions	Consumable Materials	Flat	\$50.00	\$50.00	0.0%
Schl of Public Health	Executive PHAP Campus Learning Fee	Program	Flat	\$210.00	\$250.00	19.0%
Schl of Public Health	Public Health Institute	Program	PerCredit	\$25.00	\$25.00	0.0%
Schl of Public Health	Public Health Institute Field Trip Fee 1	Travel/Lodging/Transport	PerCredit	\$35.00	\$35.00	0.0%
Schl of Public Health	Public Health Institute Field Trip Fee 4	Travel/Lodging/Transport	PerCredit	\$110.00	\$110.00	0.0%

**Attachment 7:
University of Minnesota 2024-25 Tuition Plan: Miscellaneous Fees**

Campus/College	Fee Name	Terms	Credit range	Rate type	2024 Amount	2025 Amount	Percent Change
Crookston							
Crookston	Application Fee - UMC	Fall/spring/summer	0.05 - 999.99	Flat	\$30.00	\$30.00	0.0%
Crookston	Application Fee - UMC Study Abroad	Fall/spring/summer	0.05 - 999.99	Flat	\$50.00	\$50.00	0.0%
Crookston	Confirmation/Orientation Fee - New Students -	Fall/spring	6.0 - 999.99	Flat	\$200.00	\$200.00	0.0%
Crookston	Credit by Exam (per credit)	Fall/spring/summer	0.05 - 999.99	PerCredit	\$50.00	\$50.00	0.0%
Crookston	Installment Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$20.00	\$20.00	0.0%
Crookston	Late Payment	Fall/spring/summer	0.05 - 999.99	Flat	\$40.00	\$40.00	0.0%
Crookston	NSF Check	Fall/spring/summer	0.05 - 999.99	Flat	\$20.00	\$20.00	0.0%
Crookston	Stop Payment Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$10.00	\$10.00	0.0%
Crookston	Late Registration - Weeks 1 & 2	Fall/spring	0.05 - 999.99	Flat	\$50.00	\$50.00	0.0%
Crookston	Late Registration - Week 3	Fall/spring	0.05 - 999.99	Flat	\$100.00	\$100.00	0.0%
Crookston	Academic Records Fee - Degree/Certificate	Fall/spring/summer	0.05 - 999.99	Flat	\$150.00	\$150.00	0.0%
Crookston	Academic Records Fee - Non-Degree	Fall/spring/summer	0.05 - 999.99	Flat	\$75.00	\$75.00	0.0%
Crookston	Official Transcript Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$15.00	\$15.00	0.0%
Crookston	Domestic Priority Shipping Fee for Official Documents	Fall/spring/summer	0.05 - 999.99	Flat	\$15.00	\$15.00	0.0%
Crookston	U Card Replacement Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$30.00	\$30.00	0.0%
Crookston	Course Works Complete	Fall/spring	0.05-999.99	Flat		\$279.00	new
Crookston	Course Works Select	Fall/spring	0.05-999.99	Variable	\$250.00	\$0.00-\$500.00	new
Crookston	Technology Access - Late Return	Fall/spring/summer	0.05 - 999.99	Flat	\$50.00	\$50.00	0.0%
Crookston	Technology Access - Weekly Rental	Fall/spring/summer	0.05 - 999.99	Flat	\$31.00	\$31.00	0.0%
Crookston	Technology Access - Daily Rental	Fall/spring/summer	0.05 - 999.99	Flat	\$10.00	\$10.00	0.0%
Crookston	Technology Access - Insurance Deduction	Fall/spring/summer	0.05 - 999.99	Flat	\$500.00	\$500.00	0.0%
Crookston	Confirmation Deposit - Study Abroad	Fall/spring/summer	0.05 - 999.99	Flat	\$400.00	\$400.00	0.0%
Crookston	Senior Citizen Fee In Lieu of Tuition	Fall/spring/summer	0.05-999.99	PerCredit	\$10.00	\$20.00	100.0%
Crookston	International Student Academic Fee *	Fall/spring	0.05 - 5.99	Flat	\$125.00	\$130.00	4.0%
Crookston	International Student Academic Fee *	Fall/spring	6.00 - 999.99	Flat	\$250.00	\$260.00	4.0%
Crookston	International Student Academic Fee *	Summer	0.05 - 2.99	Flat	\$62.50	\$65.00	4.0%
Crookston	International Student Academic Fee *	Summer	3.00 - 5.99	Flat	\$125.00	\$130.00	4.0%
Crookston	International Student Academic Fee *	Summer	6.00 - 999.99	Flat	\$250.00	\$260.00	4.0%
Duluth							
Duluth	Application Fee - UMD Undergrad Domestic	Fall/spring/summer	0.05 - 999.99	Flat	\$40.00	\$40.00	0.0%
Duluth	Application Fee - UMD Undergrad International	Fall/spring/summer	0.05 - 999.99	Flat	\$50.00	\$50.00	0.0%
Duluth	Application Fee - Study Abroad	Fall/spring/summer	0.05 - 999.99	Flat	\$50.00	\$50.00	0.0%
Duluth	Confirmation/Orientation Fee - NAS & IUT Students	Fall/spring	0.05 - 999.99	Flat	\$100.00	\$100.00	0.0%
Duluth	Confirmation/Orientation Fee - Freshman (NHS)	Fall/spring	0.05 - 999.99	Flat	\$175.00	\$175.00	0.0%
Duluth	Credit by Exam (per credit)	Fall/spring/summer	1.0 - 999.99	PerCredit	\$50.00	\$50.00	0.0%
Duluth	Installment Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$20.00	\$20.00	0.0%
Duluth	Late Payment	Fall/spring/summer	0.05 - 999.99	Flat	\$40.00	\$40.00	0.0%
Duluth	NSF Check	Fall/spring/summer	0.05 - 999.99	Flat	\$20.00	\$20.00	0.0%
Duluth	Stop Payment	Fall/spring/summer	0.05 - 999.99	Flat	\$10.00	\$10.00	0.0%
Duluth	Late Registration - Weeks 1 & 2	Fall/spring	0.05 - 999.99	Flat	\$50.00	\$50.00	0.0%
Duluth	Late Registration - Week3	Fall/spring	0.05 - 999.99	Flat	\$100.00	\$100.00	0.0%
Duluth	Academic Records Fee - Degree & Certificate	Fall/spring/summer	0.05 - 999.102	Flat	\$150.00	\$150.00	0.0%
Duluth	Academic Records Fee-NonDegree	Fall/spring/summer	0.05 - 999.100	Flat	\$75.00	\$75.00	0.0%
Duluth	Official Transcript Fee	Fall/spring/summer	0.05 - 999.103	Flat	\$15.00	\$15.00	0.0%
Duluth	Domestic Priority Shipping Fee for Official Documents	Fall/spring/summer	0.05 - 999.104	Flat	\$15.00	\$15.00	0.0%
Duluth	U Card Replacement Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$30.00	\$30.00	0.0%
Duluth	Course Works Complete	Fall/spring	0.05-999.99	Flat		\$279.00	new
Duluth	Course Works Select	Fall/spring	0.05-999.99	Variable	\$250.00	\$0.00-\$500.00	new
Duluth	Transportation Sustainability Fee	Fall/spring	6.00 - 999.99	Flat	\$18.00	\$18.00	0.0%
Duluth	CEHSP Post Baccalaureate Evaluation	Fall/spring/summer	0.05 - 999.99	Flat	\$31.00	\$31.00	0.0%
Duluth	Student Teaching Outside Area	Fall/spring/summer	0.05 - 2.99	Flat	\$103.00	\$103.00	0.0%
Duluth	Student Teaching Outside Area	Fall/spring/summer	3.0 - 5.99	Flat	\$206.00	\$206.00	0.0%
Duluth	Student Teaching Outside Area	Fall/spring/summer	6.0 - 8.99	Flat	\$309.00	\$309.00	0.0%
Duluth	Student Teaching Outside Area	Fall/spring/summer	9.0 - 11.99	Flat	\$412.00	\$412.00	0.0%
Duluth	Student Teaching Outside Area	Fall/spring/summer	12.0 - 999.99	Flat	\$618.00	\$618.00	0.0%
Duluth	Duluth Athletics/Athletic Facilities Fee	Fall/Spring	6.0 - 999.99	Flat	\$105.00	\$108.00	2.9%
Duluth	Senior Citizen Fee In Lieu of Tuition	Fall/spring/summer	0.05-999.99	PerCredit	\$10.00	\$20.00	100.0%
Duluth	International Student Support Services	Fall/Spring	0.05 - 999.99	Flat	\$200.00	\$204.00	2.0%
Duluth	International Student Support Services	Summer	0.05 - 999.99	Flat	\$78.00	\$78.00	0.0%
Duluth	International Student Academic Fee	Fall/spring	0.05 - 5.99	Flat	\$125.00	\$130.00	4.0%
Duluth	International Student Academic Fee	Fall/spring	6.00 - 999.99	Flat	\$250.00	\$260.00	4.0%
Duluth	International Student Academic Fee	Summer	0.05 - 2.99	Flat	\$62.50	\$65.00	4.0%
Duluth	International Student Academic Fee	Summer	3.00 - 5.99	Flat	\$125.00	\$130.00	4.0%
Duluth	International Student Academic Fee	Summer	6.00 - 999.99	Flat	\$250.00	\$260.00	4.0%

**Attachment 7:
University of Minnesota 2024-25 Tuition Plan: Miscellaneous Fees**

Campus/College	Fee Name	Terms	Credit range	Rate type	2024 Amount	2025 Amount	Percent Change
Morris							
Morris	Application Fee - UMM Electronic	Fall/spring/summer	0.05 - 999.99	Flat	\$30.00	\$30.00	0.0%
Morris	Application Fee - UMM Paper	Fall/spring/summer	0.05 - 999.99	Flat	\$40.00	\$40.00	0.0%
Morris	Application Fee - UMM Study Abroad	Fall/spring/summer	0.05 - 999.99	Flat	\$50.00	\$50.00	0.0%
Morris	Confirmation/Orientation Fee - Freshmen - UMM	Fall/spring/summer	0.05 - 999.99	Flat	\$175.00	\$200.00	14.3%
Morris	Confirmation/Orientation Fee - Transfers - UMM	Fall/spring/summer	0.05 - 999.99	Flat	\$175.00	\$200.00	14.3%
Morris	Credit by Exam	Fall/spring/summer	0.05-999.99	Flat	\$50.00	\$50.00	0.0%
Morris	Welcome Week Fee	Fall	0.05 - 999.99	Flat	\$100.00	\$100.00	0.0%
Morris	Installment Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$20.00	\$20.00	0.0%
Morris	Late Payment	Fall/spring/summer	0.05 - 999.99	Flat	\$40.00	\$40.00	0.0%
Morris	NSF Check	Fall/spring/summer	0.05 - 999.99	Flat	\$20.00	\$20.00	0.0%
Morris	Stop Payment Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$10.00	\$10.00	0.0%
Morris	Late Registration - Weeks 1 & 2	Fall/spring	0.05 - 999.99	Flat	\$50.00	\$50.00	0.0%
Morris	Late Registration - Week 3	Fall/spring	0.05 - 999.99	Flat	\$100.00	\$100.00	0.0%
Morris	Academic Records Fee - Degree & Certificate	Fall/spring/summer	0.05 - 999.99	Flat	\$150.00	\$150.00	0.0%
Morris	Academic Records Fee-NonDegree	Fall/spring/summer	0.05 - 999.99	Flat	\$75.00	\$75.00	0.0%
Morris	Official Transcript Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$15.00	\$15.00	0.0%
Morris	U Card Replacement Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$30.00	\$30.00	0.0%
Morris	Course Works Complete	Fall/spring	0.05-999.99	Flat		\$279.00	new
Morris	Course Works Select	Fall/spring	0.05-999.99	Variable	\$250.00	\$0.00-\$500.00	new
Morris	Key Deposit/Lost Key/Recore Fee (per core)	Fall/spring/summer	0.05 - 999.99	Flat	\$30.00	\$30.00	0.0%
Morris	Rental of Musical Instrument	Fall/spring/summer	0.05 - 999.99	Flat	\$40.00	\$40.00	0.0%
Morris	Rental of Space/Purchase of Storage Container	Fall/spring/summer	0.05 - 999.99	Flat	\$40.00	\$40.00	0.0%
Morris	Chemistry Lab Equipment Breakage Fee (range)	Fall/spring/summer	0.05 - 999.99	Variable	\$5.00 - \$200.00	\$5.00 - \$200.00	0.0%
Morris	Airfare Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$100 - \$1,500	\$100 - \$1,500	0.0%
Morris	International Student Support Services	Fall/spring/summer	0.05 - 999.99	Flat	\$300.00	\$300.00	0.0%
Morris	National Student Exchange Program - UMM	Fall/spring/summer	0.05 - 999.99	Flat	\$230.00	\$230.00	0.0%
Morris	Nonaffiliated Study Abroad Program Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$500.00	\$500.00	0.0%
Morris	Senior Citizen Fee In Lieu of Tuition	Fall/spring/summer	0.05-999.99	PerCredit	\$10.00	\$20.00	100.0%
Morris	International Student Academic Fee	Fall/spring	0.05 - 5.99	Flat	\$125.00	\$130.00	4.0%
Morris	International Student Academic Fee	Fall/spring	6.00 - 999.99	Flat	\$250.00	\$260.00	4.0%
Morris	International Student Academic Fee	Summer	0.05 - 2.99	Flat	\$62.50	\$65.00	4.0%
Morris	International Student Academic Fee	Summer	3.00 - 5.99	Flat	\$125.00	\$130.00	4.0%
Morris	International Student Academic Fee	Summer	6.00 - 999.99	Flat	\$250.00	\$260.00	4.0%
Morris	Athletics Materials/Travel Fee (varies by sport)	Fall/spring/summer	0.05 - 999.99	Flat	\$0.00 - \$1200.00	\$0.00 - \$1200.00	0.0%
Rochester							
Rochester	Application Fee Online UMR	Fall/spring/summer	0.05 - 999.99	Flat	\$30.00	\$30.00	0.0%
Rochester	Confirmation/Deposit - New Students	Fall/spring/summer	0.05 - 999.99	Flat	\$100.00	\$100.00	0.0%
Rochester	Confirmation/Housing Deposit Fee - All Students - UMR	Fall/spring/summer	0.05 - 999.99	Flat	\$50.00-\$125.00	\$50.00-\$125.00	0.0%
Rochester	Credit by Exam Fee UMR (per credit)	Fall/spring/summer	0.05 - 999.99	PerCredit	\$50.00	\$50.00	0.0%
Rochester	Academic Records Fee - Degree & Certificate	Fall/spring/summer	0.05 - 999.99	Flat	\$150.00	\$150.00	0.0%
Rochester	Academic Records Fee - Non-Degree	Fall/spring/summer	0.05 - 999.99	Flat	\$75.00	\$75.00	0.0%
Rochester	Official Transcript Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$15.00	\$15.00	0.0%
Rochester	Domestic Priority Shipping Fee for Official Documents	Fall/spring/summer	0.05 - 999.99	Flat	\$15.00	\$15.00	0.0%
Rochester	U Card Replacement Fee UMR	Fall/spring/summer	0.05 - 999.99	Flat	\$30.00	\$30.00	0.0%
Rochester	Course Works Complete	Fall/spring	0.05-999.99	Flat		\$279.00	new
Rochester	Course Works Select	Fall/spring	0.05-999.99	Variable	\$250.00	\$0.00-\$500.00	new
Rochester	Loss/Damage - UMR Student Housing (range)	Fall/spring/summer	0.05 - 999.99	Variable	\$5.00 - \$1,000.00	\$5.00 - \$1,000.00	0.0%
Rochester	120 Day Bus Pass - UMR	Fall/spring/summer	0.05 - 999.99	Flat	\$80.00	\$80.00	0.0%
Rochester	Capstone Program Background Check (range)	Fall/spring/summer	0.05 - 999.99	Variable	\$25.00 - \$60.00	\$25.00 - \$60.00	0.0%
Rochester	National Student Exchange Program - UMR	Fall/spring/summer	0.05 - 999.99	Flat	\$200.00	\$200.00	0.0%
Rochester	Living Learning Community Programming	Fall/spring/summer	0.05 - 999.99	Flat	\$100.00	\$100.00	0.0%
Rochester	Math Placement Assessment	Fall/spring/summer	0.05 - 999.99	Flat	\$25.00	\$25.00	0.0%
Rochester	Printing Charges Beyond Initial Allowance	Fall/spring/summer	0.05 - 999.99	Flat	\$25.00	\$25.00	0.0%
Twin Cities							
Auxiliary Services	U Card Replacement Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$30.00	\$30.00	0.0%
Auxiliary Services	Course Works Complete	Fall/spring	0.05-999.99	Flat		\$279.00	new
Auxiliary Services	Course Works Select	Fall/spring	0.05-999.99	Variable	\$250.00	\$0.00-\$500.00	new
Auxiliary Services	UMTC Transportation and Safety Fee	Fall/spring	0.05 - 999.99	Flat	\$73.00	\$74.00	1.4%
Auxiliary Services	UMTC Transportation and Safety Fee	summer	0.05 - 999.99	Flat	\$28.00	\$29.00	3.6%
Carlson Schl of Mgmt	CSOM Application Fee - MBA	Fall/spring	0.05 - 999.99	Flat	\$75.00	\$75.00	0.0%
Carlson Schl of Mgmt	IBUS Application Fee - IBUS Study Abroad	Fall/spring/summer	0.05 - 999.99	Flat	\$50.00	\$50.00	0.0%
Carlson Schl of Mgmt	IBUS Application Fee - IBUS Self-Designated	Fall/spring/summer	0.05 - 999.99	Flat	\$75.00	\$75.00	0.0%
Carlson Schl of Mgmt	CSOM Deposit - Exec MBA	Fall/spring/summer	0.05 - 999.99	Flat	\$750.00	\$200.00	-73.3%

**Attachment 7:
University of Minnesota 2024-25 Tuition Plan: Miscellaneous Fees**

Campus/College	Fee Name	Terms	Credit range	Rate type	2024 Amount	2025 Amount	Percent Change
Carlson Schl of Mgmt	CSOM Deposit - MSFIN	Fall/spring/summer	0.05 - 999.99	Flat	\$1,000.00	\$1,000.00	0.0%
Carlson Schl of Mgmt	CSOM Deposit - Full Time MBA	Fall/spring/summer	0.05 - 999.99	Flat	\$1,500.00	\$1,500.00	0.0%
Carlson Schl of Mgmt	CSOM Deposit - Full Time MSBA	Fall/spring/summer	0.05 - 999.99	Flat	\$1,500.00	\$1,500.00	0.0%
Carlson Schl of Mgmt	CSOM Deposit - HRIR	Fall/spring/summer	0.05 - 999.99	Flat	\$250.00	\$250.00	0.0%
Carlson Schl of Mgmt	CSOM Deposit - MSMK	Fall/spring/summer	0.05 - 999.99	Flat		\$1,000.00	new
Carlson Schl of Mgmt	CSOM Deposit - MSSCM	Fall/spring/summer	0.05 - 999.99	Flat	\$1,000.00	\$1,000.00	0.0%
Carlson Schl of Mgmt	CSOM Deposit - Online MBA	Fall/spring/summer	0.05 - 999.99	Flat	\$200.00	\$200.00	0.0%
Carlson Schl of Mgmt	CSOM Deposit - Part Time MAcc	Fall/spring/summer	0.05 - 999.99	Flat		\$500.00	new
Carlson Schl of Mgmt	CSOM Deposit - Part Time MBA	Fall/spring/summer	0.05 - 999.99	Flat	\$200.00	\$200.00	0.0%
Carlson Schl of Mgmt	CSOM Deposit - Part Time MBT	Fall/spring/summer	0.05 - 999.99	Flat		\$200.00	new
Carlson Schl of Mgmt	CSOM Deposit - Postbaccalaureate Certificates	Fall/spring/summer	0.05 - 999.99	Flat		\$200.00	new
Carlson Schl of Mgmt	CSOM Credit by Exam	Fall/spring/summer	0.05 - 999.99	Per credit	\$50.00	\$50.00	0.0%
Carlson Schl of Mgmt	Women in Business Membership Fee/Dues	Fall/spring/summer	0.05 - 999.99	Flat	\$30.00	\$30.00	0.0%
Carlson Schl of Mgmt	Medical Industry MBA Years 1&2 - Partnership with JointShare - Fee in Lieu of Tuition - Annual Rate	Fall/spring/summer	0.05 - 999.99	Flat	\$14,766.00	\$14,366.00	-2.7%
Carlson Schl of Mgmt	IBUS Cancellation Fee - Carlson Study Abroad Program	Fall/spring/summer	0.05 - 999.99	Variable	\$0.00 - \$5,800.00	\$0.00 - \$5,800.00	0.0%
Col of Biological Sciences	Room & Board - Itasca	Fall/spring/summer	0.05 - 999.99	Variable	\$258.00 - \$1,464.00	\$248.00 - \$1,464.00	0.0%
Col of Continuing & Prof Stud	English Language Proficiency Testing	Fall/spring/summer	0.05 - 999.99	Flat	\$45.00	\$45.00	0.0%
Col of Continuing & Prof Stud	IBH/ADDC Background Check Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$42.00	\$42.00	0.0%
Col of Design	Studio Usage - DESGN	Fall/spring/summer	0.05 - 999.99	Flat	\$15.00	\$15.00	0.0%
Col of Design	Key Deposit - DESGN	Fall/spring/summer	0.05 - 999.99	Flat	\$20.00	\$20.00	0.0%
Col of Design	Locker Deposit - DESGN	Fall/spring/summer	0.05 - 999.99	Flat	\$15.00	\$15.00	0.0%
Col of Design	Bobbin Case Replacement Fee - DESGN	Fall/spring/summer	0.05 - 999.99	Flat	\$20.00	\$20.00	0.0%
Col of Ed & Human Devel	OLPD Admin Licensure - Initial	Fall/spring/summer	0.05 - 999.99	Flat	\$550.00	\$550.00	0.0%
Col of Ed & Human Devel	OLPD Admin Licensure - Additional	Fall/spring/summer	0.05 - 999.99	Flat	\$275.00	\$275.00	0.0%
Col of Ed & Human Devel	National Student Exchange Airfare	Fall/spring/summer	0.05 - 999.99	Variable	\$100.00 - \$1,500.00	\$100.00 - \$1,500.00	0.0%
Col of Food, Ag, & Nat Rsrc Sci	Dietetic Internship	Fall/spring	0.05 - 999.99	Flat	\$8,500.00	\$8,500.00	0.0%
Col of Liberal Arts	Art- Regis Center Locker Rental (range)	Fall/spring/summer	0.05 - 999.99	Variable	\$10.00 - \$50.00	\$10.00 - \$50.00	0.0%
Col of Liberal Arts	Art - Equipment Repair & Replacement	Fall/spring/summer	0.05 - 999.99	Variable	\$10.00 - \$3,500.00	\$10.00 - \$3,500.00	0.0%
Col of Liberal Arts	Art - Late Equipment	Fall/spring/summer	0.05 - 999.99	Variable	\$5.00 - \$25.00	\$5.00 - \$25.00	0.0%
Col of Liberal Arts	Marching Band - Instrument & Uniform Equip Maintenance Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$55.00	\$55.00	0.0%
Col of Liberal Arts	Marching Band - Instrument & Uniform - Repairs over Allowance	Fall/spring/summer	0.05 - 999.99	Variable	\$2.00 - \$200.00	\$2.00 - \$200.00	0.0%
Col of Liberal Arts	Marching/Pep Band - Apparel	Fall/spring/summer	0.05 - 999.99	Variable	\$2.00 - \$60.00	\$2.00 - \$65.00	8.3%
Col of Liberal Arts	Marching/Pep Band - Late Return Instrument/Uniform	Fall/spring/summer	0.05 - 999.99	Flat	\$25.00	\$25.00	0.0%
Col of Liberal Arts	Music - Locker Rental (range)	Fall/spring	0.05 - 999.99	Variable	\$25.00 - \$55.00	\$25.00 - \$55.00	0.0%
Col of Liberal Arts	Music - Locker Late Checkout & Cleaning	Fall/spring	0.05 - 999.99	Variable	\$15.00 - \$45.00	\$15.00 - \$45.00	0.0%
Col of Liberal Arts	Music - Practice Rm Rental (range)	Fall/spring/summer	0.05 - 999.99	Variable	\$25.00 - \$290.00	\$34.00-\$298.00	2.8%
Col of Liberal Arts	Music - Ultan Recital Hall Rental	Fall/spring/summer	0.05 - 999.99	Flat	\$40.00	\$40.00	0.0%
Col of Liberal Arts	Music - Rental Instrument-Repair/Maintenance	Fall/spring/summer	0.05 - 999.99	Variable	\$9.00 - \$150.00	\$12.00-\$180.00	20.0%
Col of Liberal Arts	Music - Instrument Rental Late Return Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$25.00	\$25.00	0.0%
Col of Liberal Arts	Music - Lost Ensemble Music (range)	Fall/spring/summer	0.05 - 999.99	Variable	\$25.00 - \$200.00	\$25.00 - \$200.00	0.0%
Col of Liberal Arts	Music - Practice Rm Lost Key	Fall/spring/summer	0.05 - 999.99	Flat	\$50.00	\$50.00	0.0%
Col of Liberal Arts	Music - Recital Fee	Fall/spring/summer	0.05 - 999.99	Variable	\$35.00 - \$140.00	\$35.00 - \$140.00	0.0%
Col of Liberal Arts	Music - Choir Apparel Fee (range)	Fall/spring/summer	0.05 - 999.99	Flat	\$1.00 - \$80.00	\$1.00 - \$80.00	0.0%
Col of Liberal Arts	Key Deposit - Anthropology	Fall/spring/summer	0.05 - 999.99	Flat	\$30.00	\$30.00	0.0%
Col of Liberal Arts	ACTFL Exam (range)	Fall/spring/summer	0.05 - 999.99	Variable	\$31.00 - \$208.00	\$31.00 - \$208.00	0.0%
Col of Liberal Arts	Individual Language Assessment (ILA)/ LPE Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$30.00	\$30.00	0.0%
Col of Liberal Arts	Language Proficiency Exam - Screening	Fall/spring/summer	0.1 - 999.0	Flat	\$25.00	\$25.00	0.0%
Col of Liberal Arts	Credit by Exam	Fall/spring/summer	0.05 - 999.99	Per credit	\$50.00	\$50.00	0.0%
Col of Liberal Arts	CLA - OIT Late Equipment	Fall/spring/summer	0.05 - 999.99	Variable	\$5.00 - \$25.00	\$5.00 - \$25.00	0.0%
Col of Pharmacy	Confirmation Deposit Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$500.00	\$500.00	0.0%
Col of Pharmacy	Application Processing Fee - Occ Therapy/Medical Lab Sci	Fall/spring/summer	0.05 - 999.99	Flat	\$50.00	\$50.00	0.0%
Col of Pharmacy	Admission Confirmation Fee - Occupational Therapy Program	Fall/spring/summer	0.05 - 999.99	Flat	\$250.00	\$250.00	0.0%
Col of Pharmacy	Lab, Simulation & Practicum - Occupational Therapy Doctorate	Fall/spring/summer	0.05 - 999.100	Flat	\$150.00	\$150.00	0.0%
Col of Pharmacy	The Medical Laboratory Sciences Equipment Loss/Damage Fee	Fall/spring/summer	0.05 - 999.99	Variable	\$50.00 - \$1,000.00	\$50.00 - \$1,000.00	0.0%

**Attachment 7:
University of Minnesota 2024-25 Tuition Plan: Miscellaneous Fees**

Campus/College	Fee Name	Terms	Credit range	Rate type	2024 Amount	2025 Amount	Percent Change
Col of Sci & Engineering	Confirmation Deposit - MnRI	Fall/spring/summer	0.05 - 999.99	Flat	\$1,000.00	\$1,000.00	0.0%
Col of Sci & Engineering	Late Capstone - MOT	Fall/spring/summer	0.05 - 999.99	Flat	\$1,000.00	\$1,000.00	0.0%
Col of Sci & Engineering	Late Capstone - MDI	Fall/spring/summer	0.05 - 999.99	Flat	\$1,000.00	\$1,000.00	0.0%
Col of Sci & Engineering	Late Capstone - MSST	Fall/spring/summer	0.05 - 999.99	Flat	\$1,000.00	\$1,000.00	0.0%
Col of Sci & Engineering	Program Fee - MOT Year 1	Fall/spring	0.05 - 999.99	Flat	\$1,775.00	\$1,775.00	0.0%
Col of Sci & Engineering	Program Fee - MOT Year 2	Fall/spring	0.05 - 999.99	Flat	\$1,775.00	\$1,775.00	0.0%
Col of Sci & Engineering	CSE Anderson Labs Materials Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$5.00	\$5.00	0.0%
Col of Veterinary Med	Application Fee - DVM Program	Fall/spring/summer	0.05 - 999.99	Variable	\$85.00 - \$135.00	\$85.00 - \$135.00	0.0%
Col of Veterinary Med	Confirmation Fee - DVM Program	Fall/spring/summer	0.05 - 999.99	Flat	\$500.00	\$500.00	0.0%
Executive VP & Provost	National Student Exchange Orientation	Fall/spring/summer	0.05 - 999.99	Flat	\$50.00	\$50.00	0.0%
Executive VP & Provost	National Student Exchange Program	Fall/spring/summer	0.05 - 999.99	Flat	\$225.00	\$225.00	0.0%
Global Prog & Strategy All	MN Semester Study Abroad	Fall/spring	0.05 - 999.99	Flat	\$14,075.00	\$14,330.00	1.8%
Global Prog & Strategy All	MN Semester Study Abroad	Summer	6.00-6.99	Flat		\$6,000.00	new
Global Prog & Strategy All	MN Semester Study Abroad	Summer	7.00-7.99	Flat		\$6,558.00	new
Global Prog & Strategy All	MN Semester Study Abroad	Summer	8.00-8.99	Flat		\$7,116.00	new
Global Prog & Strategy All	MN Semester Study Abroad	Summer	9.00-9.99	Flat		\$7,673.00	new
Global Prog & Strategy All	MN Semester Study Abroad	Summer	10.00-10.99	Flat		\$8,231.00	new
Global Prog & Strategy All	International Sponsored Student Fee	Fall/spring	0.05 - 999.99	Flat	\$470.00	\$470.00	0.0%
Global Prog & Strategy All	International Sponsored Student Fee	Summer	0.05 - 999.99	Flat	\$250.00	\$250.00	0.0%
Global Prog & Strategy All	International Student Support Services	Fall/spring	0.05 - 999.99	Flat	\$270.00	\$280.00	3.7%
Global Prog & Strategy All	International Student Support Services	Summer	0.05 - 999.99	Flat	\$150.00	\$156.00	4.0%
Global Prog & Strategy All	International Student Engagement Fee	Fall/spring	0.05 - 999.99	Flat	\$16.00	\$18.00	12.5%
Global Prog & Strategy All	International Student Engagement Fee	Summer	0.05 - 999.99	Flat	\$10.00	\$12.00	20.0%
Graduate School	Application Fee - GRAD - Re-Admission/Change of Status	Fall/spring/summer	0.05 - 999.99	Flat	\$75.00	\$75.00	0.0%
Graduate School	Application Fee - GRAD (domestic)	Fall/spring/summer	0.05 - 999.99	Flat	\$75.00	\$75.00	0.0%
Graduate School	Application Fee - GRAD (International)	Fall/spring/summer	0.05 - 999.99	Flat	\$95.00	\$95.00	0.0%
Humphrey Schl of Public Affr	International Fellow Orientation/First Year	Fall/spring/summer	0.05 - 999.99	Flat	\$1,000.00	\$1,000.00	0.0%
Law School	Application - LAW	Fall/spring/summer	0.05 - 999.99	Flat	\$75.00	\$75.00	0.0%
Law School	Application - LLM - Law School	Fall/spring/summer	0.05 - 999.99	Flat	\$70.00	\$70.00	0.0%
Law School	Confirmation - LAW	Fall/spring/summer	0.05 - 999.99	Flat	\$750.00	\$750.00	0.0%
Law School	Confirmation - LLM	Fall/spring/summer	0.05 - 999.99	Flat	\$500.00	\$500.00	0.0%
Law School	Locker Rental - Law	Fall/spring/summer	0.05 - 999.99	Flat	\$11.00	\$11.00	0.0%
Medical School	Application Fee - MED (Duluth)	Fall/spring/summer	0.05 - 999.99	Flat	\$100.00	\$100.00	0.0%
Medical School	Application Fee - MED (Twin Cities)	Fall/spring/summer	0.05 - 999.99	Flat	\$100.00	\$100.00	0.0%
Medical School	Confirmation Fee - MED - Mortuary Science	Fall/spring/summer	0.05 - 999.99	Flat	\$95.00	\$95.00	0.0%
Schl of Dentistry	Application - DENT - DDS	Fall/spring/summer	0.05 - 999.99	Flat	\$85.00	\$85.00	0.0%
Schl of Dentistry	Application - DENT - Dental Therapy	Fall/spring/summer	0.05 - 999.99	Flat	\$75.00	\$75.00	0.0%
Schl of Dentistry	Application - DENT - PASS	Fall/spring/summer	0.05 - 999.99	Flat	\$150.00	\$150.00	0.0%
Schl of Dentistry	Confirmation Fee - DENT - DDS	Fall/spring/summer	0.05 - 999.99	Flat	\$1,500.00	\$1,500.00	0.0%
Schl of Dentistry	Confirmation Fee - DENT - Dental Hygiene	Fall/spring/summer	0.05 - 999.99	Flat	\$150.00	\$150.00	0.0%
Schl of Dentistry	Confirmation Fee - DENT - Dental Therapy	Fall/spring/summer	0.05 - 999.99	Flat	\$750.00	\$750.00	0.0%
Schl of Dentistry	Confirmation Fee - DENT - Endontic	Fall/spring/summer	0.05 - 999.99	Flat	\$2,000.00	\$2,000.00	0.0%
Schl of Dentistry	Confirmation Fee - DENT - PASS	Fall/spring/summer	0.05 - 999.99	Flat	\$5,000.00	\$5,000.00	0.0%
Schl of Dentistry	Instrument Usage/Material - Dental Hygiene	Fall/spring	0.05 - 999.99	Flat	\$861.00	\$861.00	0.0%
Schl of Dentistry	Instrument Usage/Material - Dental Hygiene	Summer	0.05 - 999.99	Flat	\$517.00	\$517.00	0.0%
Schl of Dentistry	Instrument Usage/Material - Dental Therapy - Grad	Fall/spring	0.05 - 999.99	Flat	\$2,137.00	\$2,137.00	0.0%
Schl of Dentistry	Instrument Usage/Material - Dental Therapy - Grad	Summer	0.05 - 999.99	Flat	\$1,062.00	\$1,062.00	0.0%
Schl of Dentistry	Instrument Usage/Materials - DDS1,2,3,4,5,PASS 3,4	Fall/spring	0.05 - 999.99	Flat	\$2,137.00	\$2,137.00	0.0%
Schl of Dentistry	Instrument Usage/Materials - Endo(Grad & Certificate)	Fall/spring/summer	0.05 - 999.99	Flat	\$1,424.00	\$1,614.00	13.3%
Schl of Dentistry	Instrument Usage/Materials - DDS,2,3,4,5, PASS 3,4	Summer	0.05 - 999.99	Flat	\$1,062.00	\$1,062.00	0.0%
Schl of Dentistry	Instrument Usage/Materials - Ortho(Grad & Certificate)	Fall/spring/summer	0.05 - 999.99	Flat		\$766.00	new
Schl of Dentistry	Instrument Usage/Materials - Perio(Grad & Certificate)	Fall/spring/summer	0.05 - 999.99	Flat	\$726.00	\$795.00	9.5%
Schl of Dentistry	Instrument Usage/Materials - Prosth(Grad & Certificate)	Fall/spring/summer	0.05 - 999.99	Flat	\$1,028.00	\$1,490.00	44.9%

**Attachment 7:
University of Minnesota 2024-25 Tuition Plan: Miscellaneous Fees**

Campus/College	Fee Name	Terms	Credit range	Rate type	2024 Amount	2025 Amount	Percent Change
Schl of Dentistry	Instrument Usage/Materials - TMD(Grad & Certificate)	Fall/spring/summer	0.05 - 999.99	Flat		\$961.00	new
Schl of Dentistry	Overgarments - Ortho (Grad and Certificate)	Fall/spring	0.05 - 999.99	Flat	\$40.00	\$40.00	0.0%
Schl of Nursing	Confirmation - NURSG - MN, PhD, DNP	Fall/spring/summer	0.05 - 999.99	Flat	\$500.00	\$500.00	0.0%
Schl of Nursing	Confirmation - NURSG - Baccalaureate	Fall/spring/summer	0.05 - 999.99	Flat	\$500.00	\$500.00	0.0%
Schl of Nursing	Lab, Simulation & Practicum - MN & DNP	Fall/spring/summer	0.05 - 999.99	Flat	\$700.00	\$700.00	0.0%
Schl of Nursing	Lab, Simulation & Practicum - Baccalaureate	Fall/spring	0.05 - 999.99	Flat	\$700.00	\$700.00	0.0%
Schl of Public Health	SPH Admission Deposit	Fall/spring/summer	0.05 - 999.99	Flat	\$250.00	\$250.00	0.0%
Student Affairs	Career Assessments (range)	Fall/spring/summer	0.05 - 999.99	Flat	\$11.00 - \$40.00	\$12.00 - \$44.00	10.0%
Student Affairs	Dental Insurance - TC - Advanced Dental Care	Fall/spring	0.05 - 999.99	Flat	\$492.24	\$492.24	0.0%
Student Affairs	Dental Insurance - UMC - Advanced Dental Care Option	Fall/spring	0.05 - 999.99	Flat	\$492.24	\$492.24	0.0%
Student Affairs	Dental Insurance - UMD - Advanced Dental Care Option	Fall/spring	0.05 - 999.99	Flat	\$492.24	\$492.24	0.0%
Student Affairs	Dental Insurance - UMM - Advanced Dental Care Option	Fall/spring	0.05 - 999.99	Flat	\$492.24	\$492.24	0.0%
Student Affairs	Health Plan - TC	Fall/spring	6.0 - 999.99	Flat	\$1,795.00	\$1,795.00	0.0%
Student Affairs	Health Plan - TC	Summer	3.0 - 999.99	Flat	\$915.00	\$915.00	0.0%
Student Affairs	Health Plan - TC - AHC	Fall/spring	0.05 - 999.99	Flat	\$1,795.00	\$1,795.00	0.0%
Student Affairs	Health Plan - TC - AHC	Summer	0.05 - 999.99	Flat	\$915.00	\$915.00	0.0%
Student Affairs	Health Plan - TC - Dental Res/Fellow	Fall/spring	0.05 - 999.99	Flat	\$253.30	\$293.80	16.0%
Student Affairs	Health Plan - TC - Dental Res/Fellow	Summer	0.05 - 999.99	Flat	\$101.32	\$117.52	16.0%
Student Affairs	Health Plan - TC - GA	Fall/spring/summer	0.05 - 999.99	Flat	\$195.47	\$195.47	0.0%
Student Affairs	Health Plan - TC - BH Group Extended Coverage Non-SSF Eligible	Fall/spring/summer	0.05 - 5.99	Flat	\$152.06	\$162.99	7.2%
Student Affairs	Health Plan - TC - BH Group Extended Coverage	Fall/spring	0.05 - 5.99	Flat	\$152.06	\$162.99	7.2%
Student Affairs	Health Plan - TC - BH Group Extended Coverage	Summer	0.05 - 5.99	Flat	\$152.06	\$162.99	7.2%
Student Affairs	Health Plan - TC -International Students	Fall/spring	0.05 - 999.99	Flat	\$1,795.00	\$1,795.00	0.0%
Student Affairs	Health Plan - TC -International Students	Summer	0.05 - 999.99	Flat	\$915.00	\$915.00	0.0%
Student Affairs	Health Plan - UMC	Fall/spring	6.0 - 999.99	Flat	\$1,795.00	\$1,795.00	0.0%
Student Affairs	Health Plan - UMC	Summer	3.0 - 999.99	Flat	\$915.00	\$915.00	0.0%
Student Affairs	Health Plan - UMC - International Students	Fall/spring	0.05 - 999.99	Flat	\$1,795.00	\$1,795.00	0.0%
Student Affairs	Health Plan - UMC - International Students	Summer	0.05 - 999.99	Flat	\$915.00	\$915.00	0.0%
Student Affairs	Health Plan - UMD	Fall/spring	6.0 - 999.99	Flat	\$1,795.00	\$1,795.00	0.0%
Student Affairs	Health Plan - UMD	Summer	3.0 - 999.99	Flat	\$915.00	\$915.00	0.0%
Student Affairs	Health Plan - UMD - AHC	Fall/spring	0.05 - 999.99	Flat	\$1,795.00	\$1,795.00	0.0%
Student Affairs	Health Plan - UMD - AHC	Summer	0.05 - 999.99	Flat	\$915.00	\$915.00	0.0%
Student Affairs	Health Plan - UMD - Graduate Assistant	Fall/spring/summer	0.05 - 999.99	Flat	\$195.47	\$195.47	0.0%
Student Affairs	Health Plan - UMD - International Students	Fall/spring	0.05 - 999.99	Flat	\$1,795.00	\$1,795.00	0.0%
Student Affairs	Health Plan - UMD - International Students	Summer	0.05 - 999.99	Flat	\$915.00	\$915.00	0.0%
Student Affairs	Health Plan - UMM	Fall/spring	6.0 - 999.99	Flat	\$1,795.00	\$1,795.00	0.0%
Student Affairs	Health Plan - UMM	Summer	3.0 - 999.99	Flat	\$915.00	\$915.00	0.0%
Student Affairs	Health Plan - UMM - International Students	Fall/spring	0.05 - 999.99	Flat	\$1,795.00	\$1,795.00	0.0%
Student Affairs	Health Plan - UMM - International Students	Summer	0.05 - 999.99	Flat	\$915.00	\$915.00	0.0%
Student Affairs	Long-Term Disability - TC - AHC	Fall/spring	0.05 - 999.99	Flat	\$50.82	\$50.82	0.0%
Student Affairs	Long-Term Disability - TC -DENT	Fall/spring	0.05 - 999.99	Flat	\$46.75	\$46.75	0.0%
Student Affairs	Long-Term Disability - TC -DENT	Summer	0.05 - 999.99	Flat	\$18.70	\$18.70	0.0%
Student Affairs	Long-Term Disability - UMD - AHC	Fall/spring	0.05 - 999.99	Flat	\$50.82	\$50.82	0.0%
Undergraduate Education	Application Fee - TC Undergrad	Fall/spring	0.05 - 999.99	Flat	\$55.00	\$55.00	0.0%
Undergraduate Education	Confirmation/Orientation Fee - TC Freshman	Fall/spring	0.05 - 999.99	Flat	\$325.00	\$325.00	0.0%
Undergraduate Education	Conf/Orient - TC Freshman - Financial Hardship	Fall/spring	0.05 - 999.99	Flat	\$200.00	\$200.00	0.0%
Undergraduate Education	Confirmation/Orientation Fee - TC Transfer	Fall/spring/summer	0.05 - 999.99	Flat	\$150.00	\$150.00	0.0%
Undergraduate Education	Conf/Orient - TC Transfer - Financial Hardship	Fall/spring/summer	0.05 - 999.99	Flat	\$90.00	\$90.00	0.0%
Undergraduate Education	Installment/Rebilling Fee	Fall/spring	0.05 - 999.99	Flat	\$20.00	\$20.00	0.0%
Undergraduate Education	Late Payment Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$40.00	\$40.00	0.0%
Undergraduate Education	Returned Payment Fee (NSF)	Fall/spring/summer	0.05 - 999.99	Flat	\$20.00	\$20.00	0.0%
Undergraduate Education	Stop Payment Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$10.00	\$10.00	0.0%
Undergraduate Education	Late Registration - Weeks 1 & 2	Fall/spring	0.05 - 999.99	Flat	\$50.00	\$50.00	0.0%
Undergraduate Education	Late Registration - Week 3	Fall/spring	0.05 - 999.99	Flat	\$100.00	\$100.00	0.0%
Undergraduate Education	Academic Records Fee - Degree & Certificate	Fall/spring/summer	0.05 - 999.99	Flat	\$150.00	\$150.00	0.0%
Undergraduate Education	Academic Records Fee-NonDegree	Fall/spring/summer	0.05 - 999.99	Flat	\$75.00	\$75.00	0.0%
Undergraduate Education	Official Transcript Fee	Fall/spring/summer	0.05 - 999.99	Flat	\$15.00	\$15.00	0.0%
Undergraduate Education	Domestic Priority Shipping Fee for Official Documents	Fall/spring/summer	0.05 - 999.99	Flat	\$15.00	\$15.00	0.0%
Undergraduate Education	International Student Academic Fee	Fall/spring	0.05 - 5.99	Flat	\$125.00	\$130.00	4.0%
Undergraduate Education	International Student Academic Fee	Fall/spring	6.00 - 999.99	Flat	\$250.00	\$260.00	4.0%

**Attachment 7:
University of Minnesota 2024-25 Tuition Plan: Miscellaneous Fees**

Campus/College	Fee Name	Terms	Credit range	Rate type	2024 Amount	2025 Amount	Percent Change
Undergraduate Education	International Student Academic Fee	Summer	0.05 - 2.99	Flat	\$62.50	\$65.00	4.0%
Undergraduate Education	International Student Academic Fee	Summer	3.00 - 5.99	Flat	\$125.00	\$130.00	4.0%
Undergraduate Education	International Student Academic Fee	Summer	6.00 - 999.99	Flat	\$250.00	\$260.00	4.0%
University Finance	Senior Citizen Fee In Lieu of Tuition	Fall/spring/summer	0.05-999.99	PerCredit	\$10.00	\$20.00	100.0%
University Finance	Capital Enhancement Fee for Student Life	Fall/spring	6.0 - 999.99	Flat	\$75.00	\$75.00	0.0%
University Finance	Stadium Fee	Fall/spring	6.0 - 999.99	Flat	\$6.00	\$6.00	0.0%

**Attachment 8:
University of Minnesota 2024-2025 Academic Fees**

Campus/College	Fee Name	Terms	Credit range	2024 Amount	2025 Amount	Percent Change
Crookston						
Crookston	Campus Fee - UMC - Technology Access	Fall/spring/summer	0.05 - 999.99	\$250.00	\$250.00	0.0%
Crookston	Durable Goods - Computer/Notebook	Fall/spring	6.0 - 999.99	\$275.00	\$275.00	0.0%
Duluth						
Duluth	Collegiate Fee - UMD - CEHSP	Fall/spring	0.05 - 5.99	\$142.00	\$147.00	3.5%
Duluth	Collegiate Fee - UMD - CEHSP	Fall/spring	6.0 - 999.99	\$284.00	\$294.00	3.5%
Duluth	Collegiate Fee - UMD - CEHSP	Summer	0.05 - 2.99	\$71.00	\$73.50	3.5%
Duluth	Collegiate Fee - UMD - CEHSP	Summer	3.0 - 999.99	\$142.00	\$147.00	3.5%
Duluth	Collegiate Fee - UMD - CAHSS	Fall/spring	0.05 - 5.99	\$174.50	\$178.50	2.3%
Duluth	Collegiate Fee - UMD - CAHSS	Fall/spring	6.0 - 999.99	\$349.00	\$357.00	2.3%
Duluth	Collegiate Fee - UMD - CAHSS	Summer	0.05 - 2.99	\$87.25	\$89.25	2.3%
Duluth	Collegiate Fee - UMD - CAHSS	Summer	3.0 - 999.99	\$174.50	\$178.50	2.3%
Duluth	Collegiate Fee - UMD - LSBE	Fall/spring	0.05 - 5.99	\$132.50	\$139.00	4.9%
Duluth	Collegiate Fee - UMD - LSBE	Fall/spring	6.0 - 999.99	\$265.00	\$278.00	4.9%
Duluth	Collegiate Fee - UMD - LSBE	Summer	0.05 - 2.99	\$66.25	\$69.50	4.9%
Duluth	Collegiate Fee - UMD - LSBE	Summer	3.0 - 999.99	\$132.50	\$139.00	4.9%
Duluth	Collegiate Fee - UMD - SCSE	Fall/spring	0.05 - 5.99	\$156.00	\$160.00	2.6%
Duluth	Collegiate Fee - UMD - SCSE	Fall/spring	6.0 - 999.99	\$312.00	\$320.00	2.6%
Duluth	Collegiate Fee - UMD - SCSE	Summer	0.05 - 2.99	\$78.00	\$80.00	2.6%
Duluth	Collegiate Fee - UMD - SCSE	Summer	3.0 - 999.99	\$156.00	\$160.00	2.6%
Duluth	Collegiate Fee - UMD - UStu	Fall/spring	0.05 - 5.99	\$101.00	\$105.00	4.0%
Duluth	Collegiate Fee - UMD - UStu	Fall/spring	6.0 - 999.99	\$202.00	\$210.00	4.0%
Duluth	Collegiate Fee - UMD - UStu	Summer	0.05 - 2.99	\$50.50	\$52.50	4.0%
Duluth	Collegiate Fee - UMD - UStu	Summer	3.0 - 999.99	\$101.00	\$105.00	4.0%
Morris						
Morris	Campus Fee - UMM	Fall/spring	0.05 - 5.99	\$81.00	\$82.50	1.9%
Morris	Campus Fee - UMM	Fall/spring	6.0 - 999.99	\$162.00	\$165.00	1.9%
Morris	Campus Fee - UMM	Summer	0.05 - 999.99	\$81.00	\$82.50	1.9%
Rochester						
Rochester	Campus Fee - UMR	Fall/spring/summer	0.05 - 5.99	\$97.50	\$102.00	4.6%
Rochester	Campus Fee - UMR	Fall/spring/summer	6.0 - 999.99	\$195.00	\$204.00	4.6%
Twin Cities						
Academic Clinical Affairs, Ofc	Collegiate Fee	Fall/spring/summer	0.05 - 5.99	\$92.50	\$97.00	4.9%
Academic Clinical Affairs, Ofc	Collegiate Fee	Fall/spring/summer	6.0 - 999.99	\$185.00	\$194.00	4.9%
Carlson Schl of Mgmt	CSOM Collegiate Fee	Fall/spring	0.05 - 8.99	\$290.00	\$303.00	4.5%
Carlson Schl of Mgmt	CSOM Collegiate Fee	Fall/spring	9.0 - 999.99	\$580.00	\$606.00	4.5%
Carlson Schl of Mgmt	CSOM Collegiate Fee	Summer	0.05 - 5.99	\$145.00	\$151.50	4.5%
Carlson Schl of Mgmt	CSOM Collegiate Fee	Summer	6.0 - 999.99	\$290.00	\$303.00	4.5%
Col of Biological Sci	Collegiate Fee - CBS	Fall/spring	3.0 - 5.99	\$185.00	\$195.00	5.4%
Col of Biological Sci	Collegiate Fee - CBS	Fall/spring	6.0 - 999.99	\$325.00	\$340.00	4.6%
Col of Biological Sci	Collegiate Fee - CBS	Summer	3.0 - 999.99	\$185.00	\$195.00	5.4%
Col of Continuing & Prof Studie:	Collegiate Fee - CCAPS	Fall/spring	0.05 - 5.99	\$95.00	\$105.00	10.5%
Col of Continuing & Prof Studie:	Collegiate Fee - CCAPS	Fall/spring	6.0 - 999.99	\$190.00	\$210.00	10.5%
Col of Continuing & Prof Studie:	Collegiate Fee - CCAPS	Summer	0.05 - 5.99	\$47.50	\$52.50	10.5%
Col of Continuing & Prof Studie:	Collegiate Fee - CCAPS	Summer	6.0 - 999.99	\$95.00	\$105.00	10.5%
Col of Design	Collegiate Fee - DESGN	Fall/spring	0.05 - 5.99	\$200.00	\$209.00	4.5%
Col of Design	Collegiate Fee - DESGN	Fall/spring	6.0 - 999.99	\$400.00	\$418.00	4.5%
Col of Design	Collegiate Fee - DESGN	Summer	0.05 - 5.99	\$100.00	\$104.50	4.5%
Col of Design	Collegiate Fee - DESGN	Summer	6.0 - 999.99	\$200.00	\$209.00	4.5%
Col of Ed & Human Devel	Collegiate Fee - CEHD	Fall/spring/summer	1.0 - 5.99	\$95.00	\$100.00	5.3%
Col of Ed & Human Devel	Collegiate Fee - CEHD	Fall/spring/summer	6.0 - 999.99	\$190.00	\$200.00	5.3%
Col of Food, Ag & Nat Rsrc Sci	Collegiate Fee - CFANS	Fall/spring	0.05 - 5.99	\$125.00	\$162.50	30.0%
Col of Food, Ag & Nat Rsrc Sci	Collegiate Fee - CFANS	Fall/spring	6.0 - 999.99	\$250.00	\$325.00	30.0%
Col of Food, Ag & Nat Rsrc Sci	Collegiate Fee - CFANS	Summer	0.05 - 2.99	\$62.50	\$81.25	30.0%
Col of Food, Ag & Nat Rsrc Sci	Collegiate Fee - CFANS	Summer	3.0 - 999.99	\$125.00	\$162.50	30.0%
Col of Liberal Arts	Collegiate Fee - CLA	Fall/spring/summer	0.05 - 5.99	\$155.00	\$162.00	4.5%
Col of Liberal Arts	Collegiate Fee - CLA	Fall/spring/summer	6.0 - 999.99	\$315.00	\$329.00	4.4%

**Attachment 8:
University of Minnesota 2024-2025 Academic Fees**

Campus/College	Fee Name	Terms	Credit range	2024 Amount	2025 Amount	Percent Change
Col of Pharmacy	Collegiate Fee - PHARM - Grad Prog	Fall/spring	0.05 - 5.99	\$110.00	\$110.00	0.0%
Col of Pharmacy	Collegiate Fee - PHARM - Grad Prog	Fall/spring	6.0 - 999.99	\$220.00	\$220.00	0.0%
Col of Pharmacy	Collegiate Fee - PHARM - Grad Prog	Summer	0.05 - 5.99	\$55.00	\$55.00	0.0%
Col of Pharmacy	Collegiate Fee - PHARM - Grad Prog	Summer	6.0 - 999.99	\$110.00	\$110.00	0.0%
Col of Pharmacy	Collegiate Fee - PHARM - Grad Prog (CAHP)	Fall/spring/summer	0.05 - 5.99	\$92.50	\$110.00	18.9%
Col of Pharmacy	Collegiate Fee - PHARM - Grad Prog (CAHP)	Fall/spring/summer	6.0 - 999.99	\$185.00	\$220.00	18.9%
Col of Pharmacy	Collegiate Fee - PHARM - PharmD - TC	Fall/spring	0.05 - 999.99	\$450.00	\$470.00	4.4%
Col of Pharmacy	Collegiate Fee - PHARM - PharmD - TC	Summer	0.05 - 999.99	\$225.00	\$235.00	4.4%
Col of Pharmacy	Collegiate Fee - PHARM - PharmD - UMD	Fall/spring	0.05 - 999.99	\$450.00	\$470.00	4.4%
Col of Pharmacy	Collegiate Fee - PHARM - PharmD - UMD	Summer	0.05 - 999.99	\$225.00	\$235.00	4.4%
Col of Sci & Engineering	Collegiate Fee - CSENG	Fall/spring	0.05 - 5.99	\$165.00	\$173.00	4.8%
Col of Sci & Engineering	Collegiate Fee - CSENG	Fall/spring	6.0 - 999.99	\$330.00	\$345.00	4.5%
Col of Sci & Engineering	Collegiate Fee - CSENG	Summer	0.05 - 2.99	\$82.50	\$87.00	5.5%
Col of Sci & Engineering	Collegiate Fee - CSENG	Summer	3.0 - 999.99	\$165.00	\$173.00	4.8%
Col of Veterinary Med	Collegiate Fee - VETMD	Fall/spring/summer	2.0 - 999.99	\$525.00	\$550.00	4.8%
Humphrey Schl of Public Affr	Collegiate Fee - HHH	Fall/spring	0.05 - 5.99	\$125.00	\$131.00	4.8%
Humphrey Schl of Public Affr	Collegiate Fee - HHH	Fall/spring	6.0 - 999.99	\$250.00	\$262.00	4.8%
Humphrey Schl of Public Affr	Collegiate Fee - HHH	Summer	0.05 - 2.99	\$37.50	\$39.50	5.3%
Humphrey Schl of Public Affr	Collegiate Fee - HHH	Summer	3.0 - 999.99	\$50.00	\$52.50	5.0%
Law School	Collegiate Fee - LAW	Fall/spring	0.05 - 5.99	\$237.50	\$248.00	4.4%
Law School	Collegiate Fee - LAW	Fall/spring	6.0 - 999.99	\$475.00	\$496.00	4.4%
Law School	Collegiate Fee - LAW	Summer	0.05 - 999.99	\$180.00	\$188.00	4.4%
Medical School	Collegiate Fee - MED Mortuary Science Program	Fall/spring/summer	0.05 - 999.99	\$50.00	\$52.25	4.5%
Medical School	Collegiate Fee - MED - Duluth Medical Students	Fall/spring	0.05 - 999.99	\$110.00	\$115.00	4.5%
Medical School	Collegiate Fee - MED - TC Medical Students	Fall/spring	0.05 - 999.99	\$110.00	\$115.00	4.5%
Schl of Dentistry	Collegiate Fee - DENT	Fall/spring/summer	0.05 - 999.99	\$207.00	\$217.00	4.8%
Schl of Dentistry	Durable Goods - Mannequin Shrouds	Fall/spring/summer	0.05 - 999.99	\$105.00	\$105.00	0.0%
Schl of Dentistry	Durable Goods - Oper/Pros Typodont-PASS	Summer	0.05 - 999.99	\$263.00	\$263.00	0.0%
Schl of Dentistry	Durable Goods - Dental Hygiene Typodonts	Fall	0.05 - 999.99		\$280.00	new
Schl of Nursing	Collegiate Fee - Nurse Anesthesia Program	Fall/spring/summer	0.05-999.99	\$457.00	\$478.00	4.6%
Schl of Nursing	Collegiate Fee - NURSG	Fall/spring/summer	0.05 - 999.99	\$250.00	\$261.00	4.4%
Schl of Public Health	Collegiate Fee - PUBHL	Fall/spring	0.05 - 5.99	\$153.00	\$160.00	4.6%
Schl of Public Health	Collegiate Fee - PUBHL	Fall/spring	6.0 - 999.99	\$228.00	\$238.00	4.4%
Schl of Public Health	Collegiate Fee - PUBHL	Summer	0.05 - 5.99	\$72.00	\$75.50	4.9%
Schl of Public Health	Collegiate Fee - PUBHL	Summer	6.0 - 999.99	\$109.00	\$114.00	4.6%

**Attachment 9:
University of Minnesota 2024-2025 Student Services Fees**

UNIVERSITY OF MINNESOTA

Office of the Executive Vice President and Provost

Minneapolis MN 55455-0110

*234 Morrill Hall
100 Church Street S.E.*

*Office: 612-625-0051
Fax: 612-624-3814*

April 8, 2024

To: Interim President Jeffrey Ettinger
Julie Tonneson, Interim Senior Vice President for Finance and Operations

From: Calvin D. Phillips, Vice President for Student Affairs and Dean of Students



Re: Student Services Fees Recommendations for 2024-25

Attached are the 2024-25 Student Services Fees recommendations for the University of Minnesota campuses. Each of the five campuses has its own autonomous review and recommendation process, and each is governed by a student-majority committee. Each campus Student Services Fees committee then forwards its recommendations to the appropriate chancellor or vice president, who in turn reviews and comments on these recommendations and then submits them to me.

We are forwarding these recommendations to you to forward to the Board of Regents as a section of the University budget for their review and action. The recommendations for the mandatory 2024-25 Student Services Fees for each campus are as follows:

Campus	2023-24 Semester Fee	2024-25 Semester Fee	Percentage Increase/Decrease
UMC	\$296.19	\$294.74	-0.5%
UMD	\$350.08	\$385.54	10.1%
UMM	\$515.50	\$533.00	3.4%
UMR	\$377.00	\$377.00	0.0%
UMTC*	\$507.89	\$523.47	3.1%

*UMTC does not include assessments for student governance groups

The details of the Student Services Fees recommendations submitted by each campus are attached. The University of Minnesota Crookston is recommending a -0.5% decrease. The University of Minnesota Duluth is recommending a 10.1% increase which is primarily to align the Capital Improvement Fee with the 2023 UMD Campus Plan Update and future capital needs for student services and programs. The University of Minnesota Morris is recommending a 3.4% increase, which includes increases to the Campus Activities Council, Community Engagement fee, Intramurals and Recreation, and Activity Fee. The University of Minnesota Rochester is recommending a 0.0% increase. The student services fees recommendation for the University of Minnesota Twin Cities is a 3.1% increase, which includes increases related to Student Legal Services, Boynton and Radio K and allows for a proposed 3.0% merit pool.

We want to take this opportunity to thank the Fees Committee members on each campus for their dedication and service on this very important and demanding project. Theirs is a big responsibility, one affecting nearly all students at the University, and we appreciate the commitment of the committee members to recommending fair and equitable fees that will best serve our student body.

**Attachment 9:
University of Minnesota 2024-2025 Student Services Fees**

University of Minnesota Student Services Fees - FY24 Actual, FY25 Proposed

Mandatory Student Service Fees per Semester (Fall & Spring) by Campus. Includes student governance. Other required fees presented with Miscellaneous Fees.

[135A.0434] Mandatory Student Activity Fees Referendum limits student activity fee increases to 2% or less unless approved by a majority student vote.
Excluded from Statute:

- Academic
- Administrative
- Health Service
- Debt Obligations

	UMC			UMD			UMM			UMR			UMTC		
	FY24	FY25	FY24-25 % Δ	FY24	FY25	FY24-25 % Δ	FY24	FY25	FY24-25 % Δ	FY24	FY25	FY24-25 % Δ	FY24	FY25	FY24-25 % Δ
Not Subject to 135A.0434 Student Activity Fees Legislation															
Administrative															
Administrative Units	\$15.50	\$13.00		\$110.10	\$114.56		\$131.50	\$145.00		\$70.00	\$70.00		\$180.09	\$186.01	
Intercollegiate Athletics	\$69.00	\$69.00					\$70.00	\$70.00							
Fitness/Recreation/Sports	\$90.00	\$90.00		\$102.02	\$111.49		\$113.00	\$116.00		\$125.00	\$125.00		\$136.52	\$140.04	
Capital Improvement Reserve Fee				\$5.05	\$20.00										
Health Services															
Health Services/Wellness	\$70.00	\$70.00		\$110.75	\$116.89		\$140.00	\$140.00		\$157.00	\$157.00		\$162.99	\$169.14	
Subtotal: Not Subject to 135A.0434:	\$244.50	\$242.00	-1.0%	\$327.92	\$362.94	10.7%	\$454.50	\$471.00	3.6%	\$352.00	\$352.00	0.0%	\$479.60	\$495.19	3.3%
Subject to 135A.0434-Student Activity Fees Legislation															
Student Activities/Organizations	\$44.00	\$45.05		\$6.34	\$7.50		\$45.83	\$44.46					\$19.22	\$19.50	
Media organizations (print, radio, etc.)				\$1.22	\$1.35		\$9.21	\$10.71					\$9.07	\$8.78	
Student Governance (fees apply based on student status)															
Crookston Student Assn (CSA)	\$7.69	\$7.69													
UMD Student Assoc				\$14.60	\$13.75										
Morris Campus Student Org (MCSA)							\$5.96	\$6.83							
Rochester Student Association (RSA)										\$25.00	\$25.00				
MN Student Association *													\$2.32	\$2.90	
Council of Graduate Students *													\$10.70	\$10.91	
Professional Student Government *													\$17.41	\$17.76	
Subtotal: Subject to 135A.0434 (Undergrad)	\$51.69	\$52.74	2.0%	\$22.16	\$22.60	2.0%	\$61.00	\$62.00	1.6%	\$25.00	\$25.00	0.0%	\$30.61	\$31.18	1.9%
(Graduate)													\$38.99	\$39.19	0.5%
(Professional)													\$45.70	\$46.04	0.7%
SSF Subtotal: Without Student Governance	\$288.50	\$287.05	-0.5%	\$335.48	\$371.79	10.8%	\$509.54	\$526.17	3.3%	\$352.00	\$352.00	0.0%	\$507.89	\$523.47	3.1%
SSF TOTAL: With Student Govern (Undergrad)	\$296.19	\$294.74	-0.5%	\$350.08	\$385.54	10.1%	\$515.50	\$533.00	3.4%	\$377.00	\$377.00	0.0%	\$538.50	\$554.65	3.0%
(Graduate)													\$518.59	\$534.38	3.0%
(Professional)													\$525.30	\$523.47	-0.3%

* Council of Graduate Students (COGS) and Professional Student Government (PSG) fees apply only to students in graduate or professional programs. Undergraduate student governance fees do not apply to these students.

**Attachment 9:
University of Minnesota 2024-2025 Student Services Fees**

**UM Crookston Student Services Fees - FY24 Actual, FY25 Proposed
Mandatory Student Service Fees per Semester (Fall & Spring). Includes student
governance. Other required fees presented with Miscellaneous Fees.**

[135A.0434] Mandatory Student Activity Fees Referendum limits student activity fee increases to 2% or less unless approved by a majority student vote.

Excluded from Statute:

- Academic
- Administrative
- Health Service
- Debt Obligations

			UMC		
			FY24	FY25	FY24-25 % Δ
1					
2					
3	Not Subject to 135A.0434 Student Activity Fees Legislation				
4	Administrative				
5	Administrative Units		\$15.50	\$13.00	
6	Intercollegiate Athletics		\$69.00	\$69.00	
7	Fitness/Recreation/Sports		\$90.00	\$90.00	
8	Health Services				
9	Health Services/Wellness		\$70.00	\$70.00	
10	Peer Health Educators		\$0.00	\$0.00	
11	Subtotal: Not Subject to 135A.0434:		\$244.50	\$242.00	-1.0%
12					
13	Subject to 135A.0434-Student Activity Fees Legislation				
14	Student Activities/Organizations		\$44.00	\$45.05	
15					
16	Student Governance (fees apply based on student status)				
17	Crookston Student Assn (CSA)		\$7.69	\$7.69	
18	Subtotal: Subject to 135A.0434 (Undergrad)		\$51.69	\$52.74	2.0%
19	SSF Total: Without Student Governance		\$288.50	\$287.05	-0.5%
20	SSF TOTAL: With Student Govern (Undergrad)		\$296.19	\$294.74	-0.5%

**Attachment 9:
University of Minnesota 2024-2025 Student Services Fees**

University of Minnesota Duluth - Individual organization Recommendations:

<i>Activity Based Organizations</i>	<i>Approximate Allocation</i>	<i>Per Student</i>
Asian Pacific American Association	\$14,000	\$0.95
Black Student Association	\$17,000	\$1.15
Hmong Living in Unity & Balance	\$13,500	\$0.91
Indigenous Student Organization	\$12,000	\$0.81
International Club	\$14,000	\$0.95
Latinx/Chicanx Student Association	\$16,000	\$1.08
Oromo Student Association	\$6,000	\$0.41
Queer and Allied Student Union	\$10,400	\$0.70
South Asian Student Organization	\$5,000	\$0.34
Stage 2	\$3,000	\$0.20
Student Government Association - Administration	\$23,500	\$1.59
Student Organization Grants	\$180,000	\$12.16
The Bark	\$20,000	\$1.35
UMD Engineers Without Borders	\$0	\$0
Total Activity Based Organizations	\$334,400	\$22.60

<i>Administrative Organizations</i>	<i>Approximate Allocation</i>	<i>Per Student</i>
Bulldog Taxi/Lyft	\$20,000	\$1.35
Glensheen	\$12,500	\$0.84
Green Fund	\$46,000	\$3.11
Health Services	\$1,655,000	\$111.82
Health Services Capital Imp	\$75,000	\$5.07
Kirby Student Center Operations/KPB	\$1,160,000	\$78.38
Kirby Capital Improvement	\$350,000	\$23.65
Library Communication and Events Team	\$3,000	\$0.20
Music Organizations	\$17,000	\$1.15
RSOP Operations	\$1,300,000	\$87.84
RSOP Capital Improvement	\$350,000	\$23.65
Student Legal Services	\$17,000	\$1.15
Theatre	\$30,000	\$2.03
Tweed Museum of Art	\$25,000	\$1.69
Womens Resource Action Center	\$15,000	\$1.01
Total Administrative Organizations	\$5,075,500	\$342.94

**Attachment 9:
University of Minnesota 2024-2025 Student Services Fees**

University of Minnesota Duluth - Overall Student Services Fee Recommendation:

<i>TOTAL SSF FEE</i>	<i>Approximate Allocation</i>	<i>Per Student</i>
2024-2025 Student Services Fee	\$5,409,900	\$365.54

**Attachment 9:
University of Minnesota 2024-2025 Student Services Fees**

**UM Duluth Student Services Fees - FY24 Actual, FY25 Proposed
Mandatory Student Service Fees per Semester (Fall & Spring). Includes student
governance. Other required fees presented with Miscellaneous Fees.**

[135A.0434] Mandatory Student Activity Fees Referendum limits student activity fee increases to 2% or less unless approved by a majority student vote.

Excluded from Statute:

- Academic
- Administrative
- Health Service
- Debt Obligations

			UMD		
			FY24	FY25	FY24-25 % Δ
1					
2					
3	Not Subject to 135A.0434 Student Activity Fees Legislation				
4	Administrative				
5	Administrative Units		\$110.10	\$114.56	
6	Fitness/Recreation/Sports		\$102.02	\$111.49	
7	Capital Improvement Reserve Fee		\$5.05	\$20.00	
8	Health Services				
9	Health Services/Wellness		\$110.75	\$116.89	
10	Subtotal: Not Subject to 135A.0434:		\$327.92	\$362.94	10.7%
11					
12	Subject to 135A.0434-Student Activity Fees Legislation				
13	Student Activities/Organizations		\$6.34	\$7.50	
14	Media organizations (print, radio, etc.)		\$1.22	\$1.35	
15					
16	Student Governance (fees apply based on student status)				
17	UMD Student Assoc		\$14.60	\$13.75	
18	Subtotal: Subject to 135A.0434 (Undergrad, Grad, and Professional)		\$22.16	\$22.60	2.0%
19	SSF Total: Without Student Governance		\$335.48	\$371.79	10.8%
20	SSF TOTAL: With Student Govern (Undergrad, Grad, and Professional)		\$350.08	\$385.54	10.1%

**Attachment 9:
University of Minnesota 2024-2025 Student Services Fees**

University of Minnesota Morris

Morris Student Service Fee Recommendations. Per student per semester.		
		2024-2025 Academic Year - Proposed
	\$131.50	\$145.00
Intercollegiate Athletics	\$70.00	\$70.00
Fitness/Recreation/Sports	\$113.00	\$116.00
Health and Wellness Fee	\$140.00	\$140.00
Student Activity Fee *	\$61.00	\$62.00
TOTAL	\$515.50	\$533.00

* Subject to MN Statute 135A.0434

Student Service Fee fund recommendations and Activity Fee allocations are provided in greater detail below.

	2024-2025 fee/semester	% Increase over prior year
Administrative Units (not subject to 135A.0434)		
Student Center	\$56.00	0%
Office of Student Activities	\$17.00	0%
Campus Activities Council	\$40.00	21%
Community Engagement	\$20.00	48%
World Touch Cultural Heritage Series Programming	\$12.00	0%
Intercollegiate Athletics	\$70.00	0%
Regional Fitness Center	\$106.00	0%
Intramurals and Recreation	\$10.00	43%
Health and Wellness (not subject to 135A.0434)	\$140.00	0%
Activity Fee (subject to 135A.0434)	\$62.00	1.6%
TOTAL	\$515.50	3.4%

**Attachment 9:
University of Minnesota 2024-2025 Student Services Fees**

University of Minnesota Morris - Continued

	ALLOC.
Campus Life Programs	
Big Friend / Little Friend (BFLF)	\$2,700
Peer Health Educators (PHE)	\$3,350
University Recognized Organizations	
Asian Student Association (ASA)	\$3,650
Black Student Union (BSU)	\$4,800
Circle of Nations Indigenous Assoc. (CNIA)	\$24,850
MoQSIE	\$7,500
International Student Association	\$3,950
KUMM	\$6,500
Morris Campus Student Association (MCSA)	\$11,950
<i>The University Register (UR)</i>	\$12,250
La Union Latinx /Voices Unidas	\$2,800
Independent Student Groups	
Alpine Ski Club	3,500
American Indian Science and Engineering Society (AISES)	\$9,000
Cougar Cheer Team	\$2,650
French Club (Entre Nous)	\$2,800
Philosophical Society	\$2,000
Totals Section + ASG	
SUBTOTAL:	\$104,250
Assistance to Student Groups (ASG)	\$30,000
ALLOCATED FEES:	\$134,250

**Attachment 9:
University of Minnesota 2024-2025 Student Services Fees**

**UM Morris Student Services Fees - FY24 Actual, FY25 Proposed
Mandatory Student Service Fees per Semester (Fall & Spring). Includes student
governance. Other required fees presented with Miscellaneous Fees.**

[135A.0434] Mandatory Student Activity Fees Referendum limits student activity fee increases to 2% or less unless approved by a majority student vote.

Excluded from Statute:

- Academic
- Administrative
- Health Service
- Debt Obligations

			UMM		
			FY24	FY25	FY24-25 % Δ
1					
2					
3	Not Subject to 135A.0434 Student Activity Fees Legislation				
4	Administrative				
5	Administrative Units		\$131.50	\$145.00	
6	Intercollegiate Athletics		\$70.00	\$70.00	
7	Fitness/Recreation/Sports		\$113.00	\$116.00	
8	Health Services				
9	Health Services/Wellness		\$140.00	\$140.00	
10	Subtotal: Not Subject to 135A.0434:		\$454.50	\$471.00	3.6%
11					
12	Subject to 135A.0434-Student Activity Fees Legislation				
13	Student Activities/Organizations		\$45.83	\$44.46	
14	Media organizations (print, radio, etc.)		\$9.21	\$10.71	
15					
16	Student Governance (fees apply based on student status)				
17	Morris Campus Student Org (MCSA)		\$5.96	\$6.83	
18	Subtotal: Subject to 135A.0434 (Undergrad)		\$61.00	\$62.00	1.6%
19	SSF Total: Without Student Governance		\$509.54	\$526.17	3.3%
20	SSF TOTAL: With Student Govern (Undergrad)		\$515.50	\$533.00	3.4%

**Attachment 9:
University of Minnesota 2024-2025 Student Services Fees**

**UM Rochester Student Services Fees - FY24 Actual, FY25 Proposed
Mandatory Student Service Fees per Semester (Fall & Spring). Includes student
governance. Other required fees presented with Miscellaneous Fees.**

[135A.0434] Mandatory Student Activity Fees Referendum limits student activity fee increases to 2% or less unless approved by a majority student vote.

Excluded from Statute:

- Academic
- Administrative
- Health Service
- Debt Obligations

			UMR		
			FY24	FY25	FY24-25 % Δ
1	Not Subject to 135A.0434 Student Activity Fees Legislation				
2	Administrative				
3	Administrative Units		\$70.00	\$70.00	
4	Fitness/Recreation/Sports		\$125.00	\$125.00	
5	Health Services				
6	Health Services/Wellness		\$157.00	\$157.00	
7	Subtotal: Not Subject to 135A.0434:		\$352.00	\$352.00	0.0%
8	Subject to 135A.0434-Student Activity Fees Legislation				
9	Student Governance (fees apply based on student status)				
10	Rochester Student Association (RSA)		\$25.00	\$25.00	
11	Subtotal: Subject to 135A.0434 (Undergrad)		\$25.00	\$25.00	0.0%
12	SSF Total: Without Student Governance		\$352.00	\$352.00	0.0%
13	SSF TOTAL: With Student Govern (Undergrad)		\$377.00	\$377.00	0.0%

Student Service Fees Committee - Twin Cities Recommendations for 2024-25 Funding

Student Activity Fee:	2023-24 Final Rec.		2024-25 Stu Fees Requested*		2024-25 Stu Fees Cmte. Final Rec.		2024-25 Stu Fees Final Rec. *	
	Revenue	Per Sem	Revenue	Per Sem	Revenue	Per Sem	Revenue	Per Sem
Student Activity Fee*	\$ 1,400,000	\$ 19.22	\$ 1,400,000	\$ 19.50	\$ 1,400,000	\$ 19.50	\$ 1,400,000	\$ 19.50
- Funding details attached								
Total Student Activity Fee:	\$ 1,400,000	\$ 19.22	\$ 1,400,000	\$ 19.50	\$ 1,400,000	\$ 19.50	\$ 1,400,000	\$ 19.50

Media Fee:	2023-24 Final Rec.		2024-25 Stu Fees Requested*		2024-25 Stu Fees Cmte. Final Rec.		2024-25 Stu Fees Final Rec. *	
	Revenue	Per Sem	Revenue	Per Sem	Revenue	Per Sem	Revenue	Per Sem
MN Daily	\$ 578,397	\$ 7.68	\$ 593,224	\$ 8.00	\$ 593,224	\$ 8.00	\$ 593,224	\$ 8.00
Students for a Conservative Voice	\$ 60,642	\$ 0.79	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Wake Student Magazine	\$ 43,916	\$ 0.60	\$ 55,826	\$ 0.78	\$ 55,826	\$ 0.78	\$ 55,826	\$ 0.78
Total Media Fee Groups:	\$ 682,955	\$ 9.07	\$ 649,050	\$ 8.78	\$ 649,050	\$ 8.78	\$ 649,050	\$ 8.78

Student Life, Health and Wellbeing Fee:	2023-24 Final Rec.		2024-25 Stu Fees Requested*		2024-25 Stu Fees Cmte. Final Rec.		2024-25 Stu Fees Final Rec. *	
	Revenue	Per Sem	Revenue	Per Sem	Revenue	Per Sem	Revenue	Per Sem
Aurora Center	\$ 426,801	\$ 5.66	\$ 426,801	\$ 5.75	\$ 434,451	\$ 5.86	\$ 434,451	\$ 5.86
Boynton Health Facility Support Fee	\$ 869,661	\$ 12.32	\$ 869,661	\$ 12.50	\$ 876,500	\$ 12.60	\$ 876,500	\$ 12.60
Boynton Health Operational Fee	\$ 10,632,062	\$ 150.67	\$ 10,882,062	\$ 156.47	\$ 10,886,976	\$ 156.54	\$ 10,886,976	\$ 156.54
Radio K	\$ 328,157	\$ 4.36	\$ 348,657	\$ 4.71	\$ 348,217	\$ 4.70	\$ 348,217	\$ 4.70
Care and Student Advocate Services	\$ 181,225	\$ 2.40	\$ 181,225	\$ 2.44	\$ 184,536	\$ 2.49	\$ 184,536	\$ 2.49
Student Conflict Resolution Center	\$ 366,534	\$ 4.86	\$ 366,534	\$ 4.94	\$ 373,104	\$ 5.03	\$ 373,104	\$ 5.03
Student Fee Administration	\$ 166,601	\$ 2.21	\$ 166,601	\$ 2.25	\$ 168,668	\$ 2.27	\$ 168,668	\$ 2.27
Student Legal Services	\$ 1,415,121	\$ 18.76	\$ 1,495,121	\$ 20.19	\$ 1,517,983	\$ 20.51	\$ 1,517,983	\$ 20.51
Student Parent Grants	\$ 150,000	\$ 1.99	\$ 150,000	\$ 2.02	\$ 150,000	\$ 2.02	\$ 150,000	\$ 2.02
Student Unions & Activities - Bond Repayment	\$ 3,559,021	\$ 47.13	\$ 3,559,021	\$ 47.97	\$ 3,559,021	\$ 47.97	\$ 3,559,021	\$ 47.97
Student Unions & Activities - Facility Support Fee	\$ 4,340,017	\$ 57.50	\$ 4,340,017	\$ 58.50	\$ 4,344,241	\$ 58.55	\$ 4,344,241	\$ 58.55
Student Unions & Activities - Operating Fee	\$ 2,655,262	\$ 35.22	\$ 2,655,262	\$ 35.79	\$ 2,714,396	\$ 36.61	\$ 2,714,396	\$ 36.61
University Recreation and Wellness -Facility Support Fee	\$ 6,260,785	\$ 82.97	\$ 6,260,785	\$ 84.38	\$ 6,248,056	\$ 84.21	\$ 6,248,056	\$ 84.21
University Recreation and Wellness - Operational Fee	\$ 4,023,560	\$ 53.55	\$ 4,023,560	\$ 54.22	\$ 4,138,785	\$ 55.83	\$ 4,138,785	\$ 55.83
Total Student Life, Health and Wellbeing Fee	\$ 35,374,807	\$ 479.60	\$ 35,725,307	\$ 492.13	\$ 35,944,934	\$ 495.19	\$ 35,944,934	\$ 495.19

Total Student Services Fees w/o Special Assessments	\$ 37,457,762	\$ 507.89	\$ 37,774,357	\$ 520.41	\$ 37,993,984	\$ 523.47	\$ 37,993,984	\$ 523.47
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Special Assessment Groups:	2023-24 Final Rec.		2024-25 Stu Fees Requested*		2024-25 Stu Fees Cmte. Final Rec.		2024-25 Stu Fees Final Rec. *	
	Revenue	Per Sem	Revenue	Per Sem	Revenue	Per Sem	Revenue	Per Sem
Council of Graduate Students	\$ 117,850	\$ 10.70	\$ 117,850	\$ 10.82	\$ 118,897	\$ 10.91	\$ 118,897	\$ 10.91
Professional Student Government	\$ 207,840	\$ 17.41	\$ 207,840	\$ 18.01	\$ 204,930	\$ 17.76	\$ 204,930	\$ 17.76
Undergraduate Student Government	\$ 128,424	\$ 2.32	\$ 193,131	\$ 3.55	\$ 158,149	\$ 2.90	\$ 158,149	\$ 2.90
Total Special Assessments	\$ 454,114	\$ 30.43	\$ 518,821	\$ 32.38	\$ 481,976	\$ 31.57	\$ 481,976	\$ 31.57

Total for All Groups	\$ 37,911,876	\$ 538.32	\$ 38,293,178	\$ 552.79	\$ 38,475,960	\$ 555.04	\$ 38,475,960	\$ 555.04
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*Note: Cmte Final and Final recommendations for Student Life, Health and Wellbeing units were adjusted for compensation and reallocation

**Attachment 10
Fund Forecast - Centrally Distributed and Attributed Funds**

	Updated Estimates w/ Actual Carryforward F.Y. 2024								Approved Budget F.Y. 2025							
	O & M	Tuition	State Special	I C R	Central Reserves	Total	Support Unit Pools	Budgeted Allocations	O & M	Tuition	State Special	I C R	Central Reserves	Total	Support Unit Pools	Budgeted Allocations
U of M SUMMARY																
Resources																
Balance Forward - Systemwide	66,054	0	0	0	38,578,729	38,644,783	0	38,644,783	1,971,419	0	0	0	93,296,517	95,267,936	0	95,267,936
Annual Revenue:																
State Legislative Appropriations	686,558,000	0	94,845,000	0	0	781,403,000	0	781,403,000	676,294,000	0	94,845,000	0	0	771,139,000	0	771,139,000
Tuition and Fees	3,300,000	984,306,142	0	0	0	987,606,142	0	987,606,142	3,300,000	1,026,526,660	0	0	0	1,029,826,660	0	1,029,826,660
Indirect Cost Recovery	0	0	0	236,362,696	0	236,362,696	0	236,362,696	0	0	0	236,990,918	0	236,990,918	0	236,990,918
Investment Income (net)	0	0	0	0	81,687,750	81,687,750	0	81,687,750	0	0	0	0	84,870,000	84,870,000	0	84,870,000
Enterprise Assessment	24,200,000	0	0	0	0	24,200,000	0	24,200,000	25,000,000	0	0	0	0	25,000,000	0	25,000,000
Other	4,532,000	0	0	0	0	4,532,000	610,881,930	615,413,930	4,532,000	0	0	0	0	4,532,000	638,447,679	642,979,679
Subtotal - Annual Revenue	718,590,000	984,306,142	94,845,000	236,362,696	81,687,750	2,115,791,588	610,881,930	2,726,673,518	709,126,000	1,026,526,660	94,845,000	236,990,918	84,870,000	2,152,358,578	638,447,679	2,790,806,257
Net Interfund Transfers	6,932,000	0	0	0	(6,932,000)	0	0	0	6,932,000	0	0	0	(6,932,000)	0	0	0
Total Resources Available	725,588,054	984,306,142	94,845,000	236,362,696	113,334,479	2,154,436,371	610,881,930	2,765,318,301	718,029,419	1,026,526,660	94,845,000	236,990,918	171,234,517	2,247,626,514	638,447,679	2,886,074,193
Allocations																
Board of Regents	0	0	0	0	90,000	90,000	975,937	1,065,937	0	0	0	0	90,000	90,000	994,937	1,084,937
President's Office	389,419	0	0	0	207,000	596,419	6,213,601	6,810,020	389,419	0	0	0	242,000	631,419	8,383,131	9,014,550
Athletics	6,914,242	0	0	0	0	6,914,242	0	6,914,242	6,931,683	0	0	0	0	6,931,683	0	6,931,683
University Relations	0	0	0	0	5,700,580	5,700,580	7,340,592	13,041,172	0	0	0	0	7,980,580	7,980,580	8,546,692	16,527,272
General Counsel	0	0	0	0	0	0	6,752,162	6,752,162	0	0	0	0	0	0	7,028,162	7,028,162
Audits	0	0	0	0	0	0	2,523,534	2,523,534	0	0	0	0	0	0	2,573,534	2,573,534
Chief Financial Officer/SVP	0	0	0	0	4,000,000	4,000,000	134,338,392	138,338,392	0	0	0	0	4,000,000	4,000,000	145,060,527	149,060,527
Human Resources	0	0	0	0	0	0	8,722,766	8,722,766	0	0	0	0	0	0	10,354,494	10,354,494
University Services	450,913	0	0	0	1,000,000	1,450,913	186,717,505	188,168,418	965,092	0	0	0	1,000,000	1,965,092	192,617,895	194,582,987
Debt Service	21,779,087	0	0	0	0	21,779,087	34,641,645	56,420,732	24,845,634	0	0	0	0	24,845,634	35,187,585	60,033,219
Exec VP/Provost Acadmic Affairs	288,736,839	671,533,415	45,581,847	81,180,682	0	1,087,032,783	181,673,179	1,268,705,962	293,852,195	706,901,706	45,581,847	82,122,478	0	1,128,458,226	186,091,626	1,314,549,852
VP Clinical Affairs	192,070,484	176,434,927	33,665,524	143,164,215	0	545,335,150	7,551,710	552,886,860	193,992,881	181,210,008	33,665,524	142,645,422	0	551,513,835	7,725,400	559,239,235
Research	26,139,481	0	703,683	8,520,088	0	35,363,252	26,877,606	62,240,858	26,240,746	0	703,683	8,642,967	0	35,587,396	27,653,806	63,241,202
Duluth	64,874,733	102,876,719	6,452,946	3,355,353	350,000	177,909,751	0	177,909,751	67,498,033	102,627,942	6,452,946	3,439,237	350,000	180,368,158	0	180,368,158
Morris	27,888,891	7,856,507	0	80,100	0	35,825,498	0	35,825,498	29,081,575	7,955,112	0	77,000	0	37,113,687	0	37,113,687
Crookston	15,500,238	17,054,642	0	62,258	0	32,617,138	0	32,617,138	15,876,787	17,672,560	0	63,814	0	33,613,161	0	33,613,161
Rochester	9,567,472	8,549,932	450,000	0	0	18,567,404	0	18,567,404	9,908,906	10,159,332	450,000	0	0	20,518,238	0	20,518,238
Contingencies and Reserves	0	0	0	0	1,000,000	1,000,000	0	1,000,000	0	0	0	0	1,000,000	1,000,000	0	1,000,000
Special Allocations	69,304,836	0	7,991,000	0	7,690,382	84,986,218	6,553,301	91,539,519	47,581,139	0	7,991,000	0	38,037,387	93,609,526	6,229,890	99,839,416
Subtotal - Allocations	723,616,635	984,306,142	94,845,000	236,362,696	20,037,962	2,059,168,435	610,881,930	2,670,050,365	717,164,090	1,026,526,660	94,845,000	236,990,918	52,699,967	2,128,226,635	638,447,679	2,766,674,314
Total Allocations	723,616,635	984,306,142	94,845,000	236,362,696	20,037,962	2,059,168,435	610,881,930	2,670,050,365	717,164,090	1,026,526,660	94,845,000	236,990,918	52,699,967	2,128,226,635	638,447,679	2,766,674,314
Change in allocations/Transfers																
Ending Balance	1,971,419	0	0	0	93,296,517	95,267,936	0	95,267,936	865,329	0	0	0	118,534,550	119,399,879	0	119,399,879
Board Policy Goal Reserve					31,256,120								30,845,560			
ANNUAL RESOURCES																
State Legislative Appropriations																
General Appropriation	686,558,000	0	0	0	0	686,558,000	0	686,558,000	676,294,000	0	0	0	0	676,294,000	0	676,294,000
MinnesotaCare	0	0	2,157,000	0	0	2,157,000	0	2,157,000	0	0	2,157,000	0	0	2,157,000	0	2,157,000
Cigarette Tax	0	0	22,250,000	0	0	22,250,000	0	22,250,000	0	0	22,250,000	0	0	22,250,000	0	22,250,000
Miscellaneous Special	0	0	7,991,000	0	0	7,991,000	0	7,991,000	0	0	7,991,000	0	0	7,991,000	0	7,991,000
Agriculture Special	0	0	42,922,000	0	0	42,922,000	0	42,922,000	0	0	42,922,000	0	0	42,922,000	0	42,922,000
Health Sciences Special	0	0	9,204,000	0	0	9,204,000	0	9,204,000	0	0	9,204,000	0	0	9,204,000	0	9,204,000
Technology Special	0	0	1,140,000	0	0	1,140,000	0	1,140,000	0	0	1,140,000	0	0	1,140,000	0	1,140,000
System Special	0	0	9,181,000	0	0	9,181,000	0	9,181,000	0	0	9,181,000	0	0	9,181,000	0	9,181,000
Subtotal - State Appropriations	686,558,000	0	94,845,000	0	0	781,403,000	0	781,403,000	676,294,000	0	94,845,000	0	0	771,139,000	0	771,139,000
Tuition																
Tuition - Crookston	0	17,054,642	0	0	0	17,054,642	0	17,054,642	0	17,672,560	0	0	0	17,672,560	0	17,672,560
Tuition - Duluth	0	102,876,719	0	0	0	102,876,719	0	102,876,719	0	102,627,942	0	0	0	102,627,942	0	102,627,942
Tuition - Morris	0	7,856,507	0	0	0	7,856,507	0	7,856,507	0	7,955,112	0	0	0	7,955,112	0	7,955,112
Tuition - Rochester	0	8,549,932	0	0	0	8,549,932	0	8,549,932	0	10,159,332	0	0	0	10,159,332	0	10,159,332
Tuition - Twin Cities	0	847,968,342	0	0	0	847,968,342	0	847,968,342	0	888,111,714	0	0	0	888,111,714	0	888,111,714
Subtotal - Tuition	0	984,306,142	0	0	0	984,306,142	0	984,306,142	0	1,026,526,660	0	0	0	1,026,526,660	0	1,026,526,660
Tuition Adjustment	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Application/Bursar Fees	3,300,000	0	0	0	0	3,300,000	0	3,300,000	3,300,000	0	0	0	0	3,300,000	0	3,300,000
Subtotal - Tuition and Fees	3,300,000	0	0	0	0	3,300,000	0	3,300,000	3,300,000	0	0	0	0	3,300,000	0	3,300,000
Indirect Cost Recovery	0	0	0	236,362,696	0	236,362,696	0	236,362,696	0	0	0	236,990,918	0	236,990,918	0	236,990,918

Attachment 10
Fund Forecast - Centrally Distributed and Attributed Funds

Updated Estimates w/ Actual Carryforward
F.Y. 2024

Approved Budget
F.Y. 2025

	Updated Estimates w/ Actual Carryforward F.Y. 2024							Approved Budget F.Y. 2025								
	O & M	Tuition	State Special	I C R	Central Reserves	Total	Support Unit Pools	Budgeted Allocations	O & M	Tuition	State Special	I C R	Central Reserves	Total	Support Unit Pools	Budgeted Allocations
Investment Income (net)																
Gross Investment Income	0	0	0	0	83,187,750	83,187,750	0	83,187,750	0	0	0	0	86,730,000	86,730,000	0	86,730,000
Realized Cap Gains/Loss & Fees	0	0	0	0	860,000	860,000	0	860,000	0	0	0	0	900,000	900,000	0	900,000
Earnings Withdrawal TIP in CEF	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Fees & Operating Deduction	0	0	0	0	(2,060,000)	(2,060,000)	0	(2,060,000)	0	0	0	0	(2,260,000)	(2,260,000)	0	(2,260,000)
Inv. Income - To Participants	0	0	0	0	(300,000)	(300,000)	0	(300,000)	0	0	0	0	(500,000)	(500,000)	0	(500,000)
Subtotal - Investment Income (net)	0	0	0	0	81,687,750	81,687,750	0	81,687,750	0	0	0	0	84,870,000	84,870,000	0	84,870,000
Other																
Internal Cost Pool Receipts	0	0	0	0	0	0	610,881,930	610,881,930	0	0	0	0	0	0	638,447,679	638,447,679
Legal Settlements	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Enterprise Assessment	24,200,000	0	0	0	0	24,200,000	0	24,200,000	25,000,000	0	0	0	0	25,000,000	0	25,000,000
Other Income/Misc. Adj	4,532,000	0	0	0	0	4,532,000	0	4,532,000	4,532,000	0	0	0	0	4,532,000	0	4,532,000
Subtotal - Other	28,732,000	0	0	0	0	28,732,000	610,881,930	639,613,930	29,532,000	0	0	0	0	29,532,000	638,447,679	667,979,679
Annual Revenue	718,590,000	984,306,142	94,845,000	236,362,696	81,687,750	2,115,791,588	610,881,930	2,726,673,518	709,126,000	1,026,526,660	94,845,000	236,990,918	84,870,000	2,152,358,578	638,447,679	2,790,806,257
Net Interfund Transfers																
Into O&M from Central Reserves	6,932,000	0	0	0	(6,932,000)	0	0	0	6,932,000	0	0	0	(6,932,000)	0	0	0
Subtotal - Net Transfers	6,932,000	0	0	0	(6,932,000)	0	0	0	6,932,000	0	0	0	(6,932,000)	0	0	0
ALLOCATIONS																
Board of Regents	0	0	0	0	90,000	90,000	975,937	1,065,937	0	0	0	0	90,000	90,000	994,937	1,084,937
President's Office	389,419	0	0	0	207,000	596,419	6,213,601	6,810,020	389,419	0	0	0	242,000	631,419	8,383,131	9,014,550
General Counsel	0	0	0	0	0	0	6,752,162	6,752,162	0	0	0	0	0	0	7,028,162	7,028,162
Audits	0	0	0	0	0	0	2,523,534	2,523,534	0	0	0	0	0	0	2,573,534	2,573,534
Chief Financial Officer																
Sr. VP Finance & Operations	0	0	0	0	0	0	2,063,695	2,063,695	0	0	0	0	0	0	2,098,695	2,098,695
Information Technology	0	0	0	0	4,000,000	4,000,000	88,454,881	92,454,881	0	0	0	0	4,000,000	4,000,000	93,334,212	97,334,212
Health/Safety & Risk Mgmt	0	0	0	0	0	0	7,674,442	7,674,442	0	0	0	0	0	0	8,250,872	8,250,872
Public Safety	0	0	0	0	0	0	17,749,643	17,749,643	0	0	0	0	0	0	19,502,943	19,502,943
Assoc VP Finance	0	0	0	0	0	0	18,395,731	18,395,731	0	0	0	0	0	0	21,873,805	21,873,805
Total - Chief Financial Officer	0	0	0	0	4,000,000	4,000,000	134,338,392	138,338,392	0	0	0	0	4,000,000	4,000,000	145,060,527	149,060,527
Human Resources	0	0	0	0	0	0	8,722,766	8,722,766	0	0	0	0	0	0	10,354,494	10,354,494
University Services																
University Services - VP	0	0	0	0	0	0	10,105,938	10,105,938	0	0	0	0	0	0	10,946,274	10,946,274
Facilities Management	0	0	0	0	1,000,000	1,000,000	171,419,783	172,419,783	0	0	0	0	1,000,000	1,000,000	176,302,173	177,302,173
Capital Planning/Project Mgmt	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Planning, Space & Real Estate	0	0	0	0	0	0	2,431,901	2,431,901	0	0	0	0	0	0	2,586,565	2,586,565
Auxiliary Services	450,913	0	0	0	0	450,913	2,759,883	3,210,796	965,092	0	0	0	0	965,092	2,782,883	3,747,975
Total - University Services	450,913	0	0	0	1,000,000	1,450,913	186,717,505	188,168,418	965,092	0	0	0	1,000,000	1,965,092	192,617,895	194,582,987
Debt Service	21,779,087	0	0	0	0	21,779,087	34,641,645	56,420,732	24,845,634	0	0	0	0	24,845,634	35,187,585	60,033,219
University Relations	0	0	0	0	5,700,580	5,700,580	7,340,592	13,041,172	0	0	0	0	7,980,580	7,980,580	8,546,692	16,527,272
Athletics	6,914,242	0	0	0	0	6,914,242	0	6,914,242	6,931,683	0	0	0	0	6,931,683	0	6,931,683
Research	26,139,481	0	703,683	8,520,088	0	35,363,252	26,877,606	62,240,858	26,240,746	0	703,683	8,642,967	0	35,587,396	27,653,806	63,241,202
Exec. VP Academic Affairs																
Exec VP & Provost	13,194,066	0	985,497	85,761	0	14,265,324	15,795,591	30,060,915	13,322,795	0	985,497	32,909	0	14,341,201	15,944,211	30,285,412
Academic Hlth Sciences	460,849	432,223	822,861	14,842	0	1,730,775	1,709,906	3,440,681	461,196	501,046	822,861	7,635	0	1,792,738	2,356,906	4,149,644
Undergraduate Education	5,278,411	4,317,699	0	0	0	9,596,110	78,684,271	88,280,381	5,338,904	4,170,804	0	0	0	9,509,708	80,224,242	89,733,950
Equity & Diversity	1,120,500	0	0	30,000	0	1,150,500	13,635,952	14,786,452	1,120,500	0	0	0	0	1,120,500	14,462,147	15,582,647
Global Prog Strategy Alliance	761,483	156,063	0	14,132	0	931,678	4,974,587	5,906,265	761,616	182,791	0	14,897	0	959,304	5,055,587	6,014,891
Graduate School	1,600,000	408,528	0	0	0	2,008,528	16,438,304	18,446,832	1,600,000	456,599	0	0	0	2,056,599	16,474,304	18,530,903
Student Affairs	2,870,255	0	0	300	0	2,870,555	4,819,236	7,689,791	3,116,266	0	0	0	0	3,116,266	4,956,236	8,072,502
University Libraries	0	0	0	324,000	0	324,000	45,615,332	45,939,332	0	0	0	316,000	0	316,000	46,617,993	46,933,993
Total - Sr. Vice President	25,285,564	5,314,513	1,808,358	469,035	0	32,877,470	181,673,179	214,550,649	25,721,277	5,311,240	1,808,358	371,441	0	33,212,316	186,091,626	219,303,942
Provost																
Education & Human Dev.	22,445,968	65,963,368	987,657	7,199,629	0	96,596,622	0	96,596,622	23,498,222	68,072,909	987,657	7,199,629	0	99,758,417	0	99,758,417
Carlson School of Management	9,803,822	90,867,032	806,526	215,375	0	101,692,755	0	101,692,755	11,625,174	97,731,384	806,526	220,759	0	110,383,843	0	110,383,843
Humphrey Inst. of Public Affairs	6,731,256	6,793,135	91,942	504,602	0	14,120,935	0	14,120,935	7,014,476	7,536,813	91,942	642,765	0	15,285,996	0	15,285,996
Law School	15,135,094	38,012,035	0	178,000	0	53,325,129	0	53,325,129	15,143,284	38,545,231	0	200,000	0	53,888,515	0	53,888,515
Design	7,286,554	21,998,058	451,444	174,019	0	29,910,075	0	29,910,075	7,310,200	23,041,518	451,444	177,553	0	30,980,715	0	30,980,715
Food., Ag., Nat. Res. Sciences	39,145,237	33,485,000	21,953,054	11,900,000	0	106,483,291	0	106,483,291	39,779,314	34,449,036	21,953,054	10,640,000	0	106,821,404	0	106,821,404
Ag Experiment Station	3,478,863	0	2,147,329	0	0	5,626,192	0	5,626,192	3,579,892	0	2,147,329	0	0	5,727,221	0	5,727,221
MN Extension Service	14,466,705	0	15,835,736	1,949,832	0	32,252,273	0	32,252,273	14,975,864	0	15,835,736	1,900,000	0	32,711,600	0	32,711,600
Continuing & Prof Studies	5,773,293	15,946,205	0	9,910	0	21,729,408	0	21,729,408	5,687,284	16,781,772	0	0	0	22,469,056	0	22,469,056
Biological Sciences	25,117,038	29,825,756	359,801	10,251,348	0	65,553,943	0	65,553,943	25,059,594	31,244,648	359,801	10,251,348	0	66,915,391	0	66,915,391
Liberal Arts	50,715,816	193,895,000	0	5,092,715	0	249,703,531	0	249,703,531	50,923,190	202,259,263	0	6,201,861	0	259,384,314	0	259,384,314

**Attachment 10
Fund Forecast - Centrally Distributed and Attributed Funds**

	Updated Estimates w/ Actual Carryforward F.Y. 2024								Approved Budget F.Y. 2025							
	O & M	Tuition	State Special	I C R	Central Reserves	Total	Support Unit Pools	Budgeted Allocations	O & M	Tuition	State Special	I C R	Central Reserves	Total	Support Unit Pools	Budgeted Allocations
Science & Engineering	63,351,629	169,433,313	1,140,000	43,236,217	0	277,161,159	0	277,161,159	63,534,424	181,927,892	1,140,000	44,317,122	0	290,919,438	0	290,919,438
Total - Provost	263,451,275	666,218,902	43,773,489	80,711,647	0	1,054,155,313	0	1,054,155,313	268,130,918	701,590,466	43,773,489	81,751,037	0	1,095,245,910	0	1,095,245,910
Academic Health Center																
Dentistry	13,810,748	33,347,462	244,000	2,374,041	0	49,776,251	0	49,776,251	13,822,123	33,991,499	244,000	1,680,000	0	49,737,622	0	49,737,622
VP-Academic Clinical Affairs	0	0	0	270,000	0	270,000	7,551,710	7,821,710	0	0	0	150,000	0	150,000	7,725,400	7,875,400
Academic Clinical Affairs	34,699,384	864,000	10,087,512	17,570,552	0	63,221,448	0	63,221,448	34,991,091	908,175	10,087,512	18,606,561	0	64,593,339	0	64,593,339
Medical School	95,824,937	55,290,902	17,670,644	91,103,352	0	259,889,835	0	259,889,835	96,066,181	56,338,202	17,670,644	91,103,352	0	261,178,379	0	261,178,379
Nursing	6,359,362	18,535,280	518,000	2,026,107	0	27,438,749	0	27,438,749	6,291,291	19,383,054	518,000	2,076,760	0	28,269,105	0	28,269,105
Pharmacy	10,429,812	24,473,837	1,444,000	6,513,363	0	42,861,012	0	42,861,012	11,312,767	24,421,655	1,444,000	6,100,000	0	43,278,422	0	43,278,422
Public Health	11,093,348	20,516,000	340,743	19,229,800	0	51,179,891	0	51,179,891	11,614,034	21,681,689	340,743	18,851,749	0	52,488,215	0	52,488,215
Veterinary Medicine	19,852,893	23,407,446	3,360,625	4,077,000	0	50,697,964	0	50,697,964	19,895,394	24,485,734	3,360,625	4,077,000	0	51,818,753	0	51,818,753
Total - Academic Health Center	192,070,484	176,434,927	33,665,524	143,164,215	0	545,335,150	7,551,710	552,886,860	193,992,881	181,210,008	33,665,524	142,645,422	0	551,513,835	7,725,400	559,239,235
Duluth	64,874,733	102,876,719	6,452,946	3,355,353	350,000	177,909,751	0	177,909,751	67,498,033	102,627,942	6,452,946	3,439,237	350,000	180,368,158	0	180,368,158
Morris	27,888,891	7,856,507	0	80,100	0	35,825,498	0	35,825,498	29,081,575	7,955,112	0	77,000	0	37,113,687	0	37,113,687
Crookston	15,500,238	17,054,642	0	62,258	0	32,617,138	0	32,617,138	15,876,787	17,672,560	0	63,814	0	33,613,161	0	33,613,161
Rochester	9,567,472	8,549,932	450,000	0	0	18,567,404	0	18,567,404	9,908,906	10,159,332	450,000	0	0	20,518,238	0	20,518,238
Contingencies and Reserves																
General Contingency	0	0	0	0	1,000,000	1,000,000	0	1,000,000	0	0	0	0	1,000,000	1,000,000	0	1,000,000
Total - Contingencies & Reserves	0	0	0	0	1,000,000	1,000,000	0	1,000,000	0	0	0	0	1,000,000	1,000,000	0	1,000,000
Special Allocations (TINA)																
Rsrv-Initiatives/CR Depreciation	2,216,479	0	0	0	449,882	2,666,361	0	2,666,361	2,021,318	0	0	0	0	2,021,318	0	2,021,318
Strategic Planning	2,668,900	0	0	0	0	2,668,900	0	2,668,900	2,668,900	0	0	0	0	2,668,900	0	2,668,900
MnDRIVE	31,103	0	0	0	0	31,103	0	31,103	31,103	0	0	0	0	31,103	0	31,103
Strategic Investment Pool	8,500,000	0	0	0	0	8,500,000	0	8,500,000	3,000,000	0	0	0	5,000,000	8,000,000	0	8,000,000
Graduate Assistant Support	3,600,000	0	0	0	0	3,600,000	0	3,600,000	3,600,000	0	0	0	0	3,600,000	0	3,600,000
Enterprise Project	22,162,818	0	0	0	0	22,162,818	0	22,162,818	22,962,818	0	0	0	0	22,962,818	0	22,962,818
Promise Scholarship	2,000,000	0	0	0	0	2,000,000	825,000	2,825,000	2,000,000	0	0	0	0	2,000,000	825,000	2,825,000
American Indian Scholars	4,032,000	0	0	0	0	4,032,000	0	4,032,000	4,032,000	0	0	0	0	4,032,000	0	4,032,000
Leases/Taxes etc.	0	0	0	0	0	0	5,728,301	5,728,301	0	0	0	0	0	0	5,404,890	5,404,890
Utility Reserve	1,000,000	0	0	0	0	1,000,000	0	1,000,000	1,000,000	0	0	0	0	1,000,000	0	1,000,000
Legal Expenses	0	0	0	0	5,000,000	5,000,000	0	5,000,000	0	0	0	0	9,277,387	9,277,387	0	9,277,387
New Bldg Operations/Utilities	289,000	0	0	0	0	289,000	0	289,000	289,000	0	0	0	0	289,000	0	289,000
Rochester/Mayo Appropriation	0	0	7,991,000	0	0	7,991,000	0	7,991,000	0	0	7,991,000	0	0	7,991,000	0	7,991,000
NR Investments	7,064,536	0	0	0	2,234,000	9,298,536	0	9,298,536	1,500,000	0	0	0	3,860,000	5,360,000	0	5,360,000
Housing/Dining-COVID Shortfalls	0	0	0	0	0	0	0	0	0	0	0	0	12,400,000	12,400,000	0	12,400,000
Bridging Unit Shortfalls	0	0	0	0	0	0	0	0	0	0	0	0	7,500,000	7,500,000	0	7,500,000
LCCMR Appropriations/TIP	0	0	0	0	6,500	6,500	0	6,500	0	0	0	0	0	0	0	0
Misc. Appropriations Recurring	1,476,000	0	0	0	0	1,476,000	0	1,476,000	476,000	0	0	0	0	476,000	0	476,000
Misc. Appropriations NR	4,264,000	0	0	0	0	4,264,000	0	4,264,000	4,000,000	0	0	0	0	4,000,000	0	4,000,000
CentraCare Appropriation NR	10,000,000	0	0	0	0	10,000,000	0	10,000,000	0	0	0	0	0	0	0	0
Total - Special Allocations	69,304,836	0	7,991,000	0	7,690,382	84,986,218	6,553,301	91,539,519	47,581,139	0	7,991,000	0	38,037,387	93,609,526	6,229,890	99,839,416
ALLOCATIONS	723,616,635	984,306,142	94,845,000	236,362,696	20,037,962	2,059,168,435	610,881,930	2,670,050,365	717,164,090	1,026,526,660	94,845,000	236,990,918	52,699,967	2,128,226,635	638,447,679	2,766,674,314

Public Comment on the Interim President's Recommended FY 2025 Annual Operating Budget

In an effort to collect feedback from the University community on the Interim President's recommended FY 2025 annual operating budget, the Board held a public forum on May 10. A total of 18 members of the University community provided their comments at the forum. A video recording of the public forum is available [online](#).

In addition to the in-person public forum opportunity, students, staff, faculty, alumni, and community members were invited to provide written, audio, and/or video feedback on the Interim President's recommended FY 2025 annual operating budget through the [Board's Virtual Forum](#). Comments were collected from May 3 to June 7 on the Board's website.

The public comment opportunity was promoted to students, staff, and faculty through the U of M Brief newsletter; on the MyU Portal; and direct communication with chancellors, deans, University Senate, and student leaders. In addition, the comment period was promoted to the public in a press release issued ahead of the May Board meeting.

The comments received appear on the following pages in the order they were received. In accordance with the [Board's guidelines](#), non-public information has been redacted.

Public Comment on the President's Recommended FY 25 Annual Operating Budget

First Name	Last Name	Affiliation	Message
Isabel	Laderman	Student	<p>I am a [REDACTED] student [REDACTED] As such, I call for the University to divest from entities committing war crimes [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] All of this is a distraction from the real issue: the ongoing genocide in Palestine. This did not start on October 7th. As someone getting my degree in history, I could cite so many instances of ethnic cleansing from 1948 to today, such as the Tantura massacre. I could explain exactly how this situation came to be and how the IDF used the exact same tactics the nazi's used on them. However, I have limited characters and believe you are smart enough to do the research yourself, especially when I learned all of this from a class the university offers on Israel/Palestine. The sources are available, I urge you to read Theodore Herzl's writing and see for yourself exactly what zionism has always been: colonization and ethnic cleansing. With this history in mind, I demand:</p> <ol style="list-style-type: none"> 1. Fully disclosing all remaining public investments by May 17th 2. Presenting and voting in favor of the divestment resolution prepared by the divestUMN coalition 3. Run social and environmental screening on all invested funds 4. Form a task force of students, faculty, and staff to review past investment and ensure future investment are ethical. <p>Thank you, Isabel (Izzy) Laderman</p>
Benjamin	Litzau	Student	Divest
Lila	Roach	Student	Please divest in all companies contributing to the genocide in Gaza.

Public Comment on the President's Recommended FY 25 Annual Operating Budget

First Name	Last Name	Affiliation	Message
Julieta	Hernandez	Student	DIVEST UNIVERSITY FUNDS FROM APARTHEID ISRAEL AND ALL COMPANIES THAT ARE COMPLICIT IN THE GENOCIDE OF THE PALESTINIANS.
Haleigh	Keane	Student	DIVEST OUR FUNDS FROM ISRAEL. DO NOT SUPPORT THE APARTHEID STATE OF ISRAEL. STOP FUNDING AND SENDING MONEY TO ANY COMPANY AFFILIATED WITH ISRAEL.
RJ	Martell	Student	WE DO NOT THE GENOCIDE BEING CREATED BY ISRAEL. WE NEED TO DIVEST NOW!!!
Anna	Egelhoff	Alumni	On the morning of May 10th, I watched students, staff and faculty of the university bravely speak about why the UofM must divest from Israel. It is the students who make up the lifeblood of this institution, as one professor remarked, and it could not be more true. As an alum I am ashamed to learn that my college invests money into companies who profit from war and the genocide of the Palestinian people. It feels like a simple fact that universities should not be sending student tuition dollars for war crimes and yet you dispatch police in riot gear to terrorize your students for speaking out about senseless murder. Listen to your students! Listen to the referendum that passed with a 2/3 majority that your student body does NOT support Israel and their ruthless ethnic cleansing. I ask you, board of regents, to divest ALL university money from Israel and be a good steward to your student body here in Minnesota and across the globe.
eun-kyung	suh	Faculty	Please fulfill the mission and vision of the University of Minnesota by divesting funds for human rights.
Maddy	Schwartz	Alumni	<p>Hello, As a graduate of the School of Public Health at the University of Minnesota, I strongly ask that the UMN divest from all companies benefitting from and contributing to the genocide of Palestinians and war in general. This is necessary for the UMN to support health, safety, and dignity for all and practice what the UMN preaches. I stand with the UMN students in their ask for divestment from genocide.</p> <p>Maddy Schwartz, MPH</p>

Public Comment on the President's Recommended FY 25 Annual Operating Budget

First Name	Last Name	Affiliation	Message
Myeka	Pangilinan	Student	Please divest from Isreal. I do not want my tuition money funding the genocide in Gaza and the Palestinian people. I believe that the university response to the encampment and pro-palestine protests are overblown and fear mongering when the disclosed budget revealed the amount the university could easily divest.
Tessa	Rauch	Community Member	I am writing to urge the UMN Board of Regents to listen to the students of their institution and divest the university of all investments in weapons companies and companies supporting and enabling the slaughter of Palestinian civilians. Over 34,000 people, many of them children, have been murdered while trapped in occupied territory, and Israel has cut off access to food, water, medical care, and all other necessities for those who still survive. Every single Gazan university has been leveled. The students, faculty, and Minnesota community have made their wishes known in no uncertain terms, it now falls on the good people of the Board to work to divest from all companies supporting this genocide and align the university's finances with its values.
Clark	Yentzer	Student	I support the University of Minnesota in its decision to divest from Israel
Isabel	Eguizabal	Student	My name is Isabel Eguizabal and I am a 3rd year student of Urban Studies and Geography here at the University I am writing this comment in support of divestment from companies that is listed in BDS and Divest UMN. I do NOT want my tuition dollars to be going to companies that take part in and profit from genocide. Out of the current disclosurement that went public last night, only 0.1% of it was invested in companies that is on the list targeted for divestment. With such a small amount invested, it would be a shame and a stain on the University to not divest. What will the upcoming High School graduates think when they see the University is complicit in genocide? How will you convince those students to come when the you can't even divest of 0.1% of your fund? What will your children and grandchildren think when you couldn't move 0.1% of the funds supporting genocide?

Public Comment on the President’s Recommended FY 25 Annual Operating Budget

First Name	Last Name	Affiliation	Message
			<p>DIVEST NOW!</p> <p>-Isabel Eguizabal</p>
Aila	O'Loughlin	Student	<p>Dear Regents,</p> <p>I am a graduate student at the University of Minnesota. On Friday, May 10, I had the opportunity to listen to one of my undergrad students speak in the public comments section of the Board of Regents meeting urging the UMN to divest from the university’s investments in company that build bombs and chemical warfare that are currently being used against Palestinian citizens.</p> <p>I was inspired by my student, as well as the many undergraduate students, graduate student, employee, and faculty that urged that same divestment.</p> <p>The UMN divested from South African apartheid in 1985, from the genocide in Sudan in the 90s, and again recently from fossil fuels—these were all courageous choices with much pressure and opposing viewpoints at play. On these occasions, despite the tumult and pressure, the UMN knew that it would be a part of innovations of sustainability and peace if its Regents chose to divest. And they did.</p> <p>It is that same act of both reason and courage that we need today.</p> <p>We need the board of regents to divest from all corporations that manufacture bombs and objects of chemical warfare as an absolute minimum, with special attention to the ways we can also divest from corporations that maintain apartheid states.</p> <p>Thank you for your time. I urge you to listen to the majority student referendum vote that passed this spring as well as the student speakers at the Regents meeting and divest from genocide.</p>

Public Comment on the President's Recommended FY 25 Annual Operating Budget

First Name	Last Name	Affiliation	Message
Sam	Sharpe	Community Member	As a member of Healthcare Workers for Palestine - Twin Cities - I stand in unequivocal solidarity with the Univ of MN student protestors and allies who have organized and communicated the conscience of all of us in demanding an end to the Univ of MN's financial complicity in Israel's genocidal campaign against the Palestinian people. Today we join their calls for full transparency and disclosure of the Univ of MN's investments, voting Yes on the Divestment Resolution, run social and environmental screenings on all invested funds, and the formation of a joint student/faculty taskforce to review past and all future investments. It has never been clearer - there is no future in institutions and systems that profit off of the desecration of human life. We demand the Univ of MN follow through on its promises and divest from occupation, apartheid, and genocide.
Mian Moaz	Uddin	Community Member	I understand it's not easy, and it's not the most practical thing to do. But please listen to your students. Please divest from Israel.
Ava	Roots	Student	<p>It is time for the university to divest from its complicity in war crimes and human rights violations around the globe. This board has repeatedly affirmed throughout its history to divest from human rights abuses around the globe. In the 1970s and 1980s, students brought similar concerns regarding its financial and academic ties to apartheid South Africa. After years of student demands, the university decided that it was time to divest from the brutal apartheid that denied Black South Africans their most basic human rights. Again, this university took up the question of divestment in 1998 when the University Senate Social Concerns Committee voted to divest from Total Oil and their human rights abuses in Myanmar (then Burma). Both of these votes reflect that it is a continued demand from the university community that human rights abuses not be done in our names and our dollars.</p> <p>What these histories tell us is two-fold: first, it is firmly within the domain of this university and Board of Regents to divest. Second, the University of Minnesota has decided time and time again that it is our responsibility to do so. Given widespread evidence of human rights abuses, the university should and must divest from companies that continue to engage in these actions. It is not enough to release wishy-washy statements. It is time to speak with our actions, specifically the university budget.</p>

Public Comment on the President’s Recommended FY 25 Annual Operating Budget

First Name	Last Name	Affiliation	Message
			<p>This university continually argues that it is here to teach students to be engaged members of a globalized community. The repression of student voices and the refusal to engage in divestment is a betrayal of this mission. The Board of Regents has the power to divest and the university community is clearly and firmly in favor. Rather than spending our precious dollars on overtime for riot cops to detain and intimidate protestors, spend it on instruction, wages for staff, and improving resources available on campus. Instead of investing in companies that have facilitated the deaths of thousands across Sudan, Afghanistan, Gaza, and more, invest our dollars in companies that reflect the interests of your students, faculty and staff.</p> <p>It is time to no longer be complicit. Instead, it is the responsibility of the Board of Regents to listen to what your communities are asking for. Again and again, students, faculty, staff, and alumni have shown that they want full and complete divestment from human rights abuses. This much is clear. No longer should the tuition of students be invested in the companies dismembering, killing, and displacing our counterparts in other areas of the globe. Your students are asking you do to what this university has done time and time again: divest. This action is not only necessary but long overdue.</p> <p>Disclose. Divest.</p> <p>Your community has told you we will not rest until we see what we are asking for reflected in the budget and investments of this university and we mean it.</p>
Carly	DeLeu	Community Member	<p>To the Boardof Regents,</p> <p>I am writing to express my support for the students of the University of Minnesota as a community member and current graduate student at Minnesota State University, Mankato. I fully support students at the University of Minnesota in their demands that U of M divest from weapons manufacturing companies complicit in war crimes. Universities are respectable spaces that should serve their students learning, not invest in wars; especially when it hurts communities on its campuses.</p> <p>I urge the university to fulfill the demands of the students by:</p>

Public Comment on the President's Recommended FY 25 Annual Operating Budget

First Name	Last Name	Affiliation	Message
			<p>1. Fully disclosing all remaining public investments by May 17.</p> <p>2. Presenting and voting in favor of the divestment resolution prepared by the divestUMN coalition to the board of regents meeting today.</p> <p>3. Run social and environmental screening on all invested funds.</p> <p>4. Form a task force of students, faculty, and staff to review past investments and ensure future investments are ethical.</p> <p>Thank you in advance for your attention and supporting students demands.</p> <p>Sincerely, Carly DeLeu Mankato, MN</p>
Eliana	Meyerowitz	Community Member	<p>I am a Jewish community member with family born and raised and still living in Israel. I cannot justify or defend financial investments in Israeli companies as a valuable (neither financially nor ethically) use of funds. I recognize this is a process and there are risks, but we see the direction the community, students, and faculty are moving. Of the 33 Israeli-based companies and eight U.S. ones perpetuating Israeli war crimes, there must be ways to not renew investments and redistribute those funds toward more direct needs of the University. I understand that you may be new to learning even Jewish Americans and Israelis oppose the violence of the last 7 and a half decades, and I hope you have come to understand you are not harming American Jews by shifting your academic and financial ties to a complicated state. We are watching ethnic cleansing in twos time and you have power, plus a responsibility to your students, faculty, staff, and community. Do not tune out. Do not rely on old models. The time to change is now.</p>
Grace	Sommers	Alumni	<p>With the ongoing genocide and occupation in Palestine, I urge the University of Minnesota to work towards divesting from Israel. Those funds can be better sent not supporting human rights violations and the work of settler colonialism</p>
Fiona	Adams	Community Member	<p>I am writing to express my great concern with the UMN's investment in Israel and in companies that create weapons of war. I demand that you divest immediately, listen to the</p>

Public Comment on the President’s Recommended FY 25 Annual Operating Budget

First Name	Last Name	Affiliation	Message
			students—LISTEN!! Be on the right side of history. Tens of thousands of children dead, you don’t want that blood on your hands—I know you are better than that.
David	Rischoff	Student, Alumni, Community Member	I feel one way to reduce the need for tuition hikes is to curtail the growth of administrative staff. I am not talking about the lower echelons of support staff, but the proliferation of vice presidents, associate deans, and of administrators of all stripes. My assessment is that more resources are needed for instruction and research, the purpose of the U, and less to administrative.
Kirsten	Larsen	Staff	My name is Kirsten Larsen; I am the events and communications manager with the Law School's Office of Advancement. The majority of my work involves planning for and hosting alumni and donor events to increase engagement and philanthropy. Due to inflation, the rising costs of food and waitstaff, and general additional fees, events are significantly more difficult and costly to produce. Mainly, it is difficult to stay within the University's rule of \$100/per person at events. The University's spending policy has not grown or adapted to current hosting costs. We are currently priced out of and unable to use many former venues across the Twin Cities (including venues on campus such as McNamara Alumni Center or the Weisman) because the cost of events no longer complies with spending guidelines. For example, a plated dinner, at the Nicollet Island Inn, cost \$56/person in FY23 and now is \$78/per person in FY24. This number does not include tax, gratuity or drinks. Our office is incredibly cognisant of the importance of thoughtful spending and is very intentional in spending wisely and always looks for ways to save. However, we, and other event professionals across campus, recognize that our work must be done well and well-produced to ensure a positive donor and alumni experience. I urge the Board of Regents to update the guidelines to ensure it reflects the current cost of business, thus making it possible for us to fulfill our duties and the work expected of us.
Aimee	Cloutier	Staff	Dear Board of Regents, I am writing to provide feedback on the 2025 proposed budget, particularly regarding the implications of the room and board rate increases and the operating-related expense reductions.

Public Comment on the President’s Recommended FY 25 Annual Operating Budget

First Name	Last Name	Affiliation	Message
			<p>Firstly, I understand the necessity behind the proposed room and board rate increases ranging from 2.8-8.9% across campuses. These adjustments are aimed at covering rising labor costs and food inflation, which are essential to maintaining the University's operations and quality of services.</p> <p>However, I have concerns about the proposed \$2.1 million in expense reductions, particularly those targeting non-compensation spending, including supplies, food, and professional development. While cost efficiency is important, it's essential to consider the potential adverse effects these reductions could have on our ability to carry out our responsibilities effectively and meet the needs of our students and staff.</p> <p>As someone involved in event planning and catering, I have experienced significant challenges due to rising food costs and additional fees imposed by restaurants and catering businesses. The current budget constraints make it difficult to cater meals and host events that are essential for student engagement, faculty collaboration, and community building within the University. These events are crucial aspects of our educational environment, fostering learning, networking, and professional development.</p> <p>Further reductions in expense allowability would exacerbate these difficulties. If the proposed budget is implemented without considering these practical implications, we might struggle to provide the necessary support and resources for critical university functions, potentially undermining our ability to deliver high-quality educational experiences.</p> <p>Additionally, reducing funds for professional development can have a detrimental impact on employee retention and the quality of our workforce. Professional development is an investment in our staff, ensuring they remain at the forefront of their fields and bring innovative practices and current knowledge to their roles. Employees who feel supported in their growth and career advancement are more likely to stay with the organization, reducing turnover costs and maintaining the continuity and quality of our programs and services.</p> <p>I urge the Board to carefully consider these practical implications as you finalize the 2025</p>

Public Comment on the President's Recommended FY 25 Annual Operating Budget

First Name	Last Name	Affiliation	Message
			<p>budget. Ensuring flexibility in catering, event services, and professional development is crucial for the University's continued success and smooth functioning.</p> <p>Thank you for considering this feedback. I hope my insights help inform a balanced and practical approach to budgeting that supports the University's mission while acknowledging operational realities.</p>
Matisse	Bolstrom	Student	<p>It is upsetting the tuition is being raised in the coming years. For people my age and going into my field, public health, it is really discouraging to hear that they are further increasing tuition.</p>
Saleha	Ali	Student	<p>Dear Board of Regents,</p> <p>I am an undergraduate student at the College of Biological Sciences. I do not support a tuition increase, especially if this university continues to be invested in companies complicit in the Genocide of Palestinian people. Companies such as Lockheed Martin, General Electric, Boeing, Honeywell and more directly provide the equipment caused to murder innocent people. Many of those murdered are family members of students at this University.</p> <p>Tuition costs are already very high. [REDACTED] [REDACTED] Increasing costs will increase the burden on families such as my own. Instead, I recommend in investing in different companies that are not participating in genocide to help financially support this institution.</p> <p>Using our money to kill our own families in Palestine goes against the University of Minnesota values. It is not a complicated conflict. Killing innocent children is wrong. I urge the University of Minnesota to be on the right side of history and find ethical investments. No one want to learn about diversity, equity, and inclusion from an institution that profits off of ethnic cleansing.</p> <p>Please do the right thing.</p>

Public Comment on the President’s Recommended FY 25 Annual Operating Budget

First Name	Last Name	Affiliation	Message
			Sincerely, Saleha Ali
Jadelynne	Stevensen-Zapata	Student	<p>To whom it may concern, As a first year student I have routinely attempted to branch out and explore campus. One of the ways was getting a job doing public safety. This job has given me the opportunity to learn campus as a whole and get a better idea of what each building holds. Now I understand that the Carlson School of Business Management will be undergoing a remodel coming this December. This strikes a lot of concern amongst students and staff. I have heard (not have confirmed) that a whopping \$20 million dollars will go towards this remodel. That it will include a walking track and the stairs will be places elsewhere. That being said the remodel of Carlson is not the concern. The concern is that we pay thousands of dollars in tuition and other buildings are looked over. For example, Keller Hall. Keller Hall is currently undergoing some type of leak which is causing the building to crumble from the inside. There are tarps holding the corner of the wall together and I have seen no immediate attempt of undergoing a solution to this fast growing issue. Additionally there are many exterior doors in which need to be fixed and/or replaced around campus. No matter how many times we report the first level door of Heller Hall on West Bank is propped open (allowing for unwelcome guests to enter) there seems to be no progress. My question is, why are we prioritizing a building (which does not appear to have any current, emergent issues) over a suitable and safe classroom space for the other students attending and paying to be here?</p> <p>Additionally, I have had the pleasure of meeting and conversing with some of the staffing at Boynton. One of the most common complaints is that the University of Minnesota will not pay for an updated computer system for Boynton Health. [REDACTED] this makes things difficult. There should be a way for Boynton Health to access and share common medical records with major hospitals and companies that handle it. Going in there and having to explain each and every symptom or underlying condition takes away from students time, money, and resources just to ensure they are healthy. The fact that M Health Fairview (a company OWNED by the University of Minnesota) is not supported in the computer system to exchange or see medical charts is astounding. It would make the healing process for a student extremely beneficial. Again though, we are</p>

Public Comment on the President's Recommended FY 25 Annual Operating Budget

First Name	Last Name	Affiliation	Message
			<p>prioritizing a building with no immense construction damage or emanate danger over students health and safety.</p> <p>Concluding this comment I would like to ask where does our money go? Does it fund the state primarily? Does it fund the Fraser project? Does it fund the Carlson project? Is any of this truly necessary over the health and safety of the students attending? Why does the University of Minnesota push using Boynton Health [REDACTED] [REDACTED] Should the Students and staff just use M Health Fairview? That seems like a better option.</p> <p>Thank you, Jadelynne Stevensen-Zapata</p>
Lora	Seery	Community Member	<p>Concerns of the tuition increase for 24-25 school year on Twin cities campus. With the consistent crime increase in and around campus and then to raise tuition with low enrollment makes no sense. Hard to watch on the news the constant assaults and car jacking on students with seemingly no help from University leadership. As a community member who was police officer for 25 years, the once beautiful campus where I worked overtime at athletic events to keep everyone safe has now become a place I don't ever want to visit. Please think about how expensive college is and high balance of student loans most leave college with and also, so many can't even afford to go. Has anyone in the administration(U president makes \$1 million) thought to take a pay cut and maybe not raise tuition on our hard working students?</p>
Katherine	Goffin	Staff	<p>Esteemed Regents, After reading your FY2025 operating budget here are my thoughts.</p> <p>First, I recognize the value that the University of Minnesota has in our community. I received both of my degrees here and am proud of the positive role that the U plays in our society. I am proud to be part of the UMN workforce. I have chosen to work here instead of in a more lucrative corporate job because I value our mission.</p> <p>Second, parts of your May 9 document show that you recognize the importance of</p>

Public Comment on the President's Recommended FY 25 Annual Operating Budget

First Name	Last Name	Affiliation	Message
			<p>University employees to fulfilling our mission. (See excerpts below)</p> <p>"The top two priorities for this year are 1) attracting and retaining talented faculty and staff necessary to achieve the University's strategic goals and 2) addressing inflationary pressures and other financial challenges varying by unit."</p> <p>"While money spent on salaries and benefits represent the greatest expenditure at the University, it is also a critical investment necessary to recruit and retain a quality workforce able to fulfill the University's mission.</p> <p>Board of Regents Policy: Employee Recruitment and Retention ... includes guiding principles that foster the recruitment and retention of employees as follows:</p> <p>... (b) The University seeks to recruit, hire, and retain a diverse workforce with employees whose knowledge, skills, abilities, and service orientation support the University's standards of excellence.</p> <p>(c) The University strives to offer employees a compensation package that is competitive with peer institutions and other relevant labor markets.</p> <p>(d) The University, in developing workplace policies, services, and programs, seeks to understand and take into account the factors that affect job satisfaction and productivity."</p> <p>Third, however, after reading these fine sentiments, the unwillingness you have shown in the past to provide a living wage to labor-represented employees and to other staff and non-tenured faculty makes it difficult to believe that these words are not mere lip service.</p> <p>Fourth, this section of your document belies the great things you say about valuing employees. (see excerpt below)</p> <p>"Compensation-Related Expense Reductions ...</p> <ul style="list-style-type: none"> - eliminating faculty and staff positions (through natural attrition), - hiring replacement employees at a lesser salary than the previous employees, and - reducing appointments (a portion of FTE) for continuing positions. <p>... this generally results in the reassignment of existing work to others or restructuring processes to eliminate work and gain efficiencies."</p> <p>How do those measures align with valuing employees? Hiring people at lower rates does not provide a fair wage. More work for the same pay? Assigning more work to current employees after their colleagues leave is equivalent to a pay cut. Reducing a FTE to part</p>

Public Comment on the President's Recommended FY 25 Annual Operating Budget

First Name	Last Name	Affiliation	Message
			<p>time? That is not a living wage.</p> <p>Finally, I ask you to please keep your priorities of retaining talent and reducing inflationary pressures at the forefront as you make your budget decisions. I, a civil service employee with an advanced degree, am part of the talent pool working hard to advance the University of Minnesota's mission. I hope to remain here. But unless you show me that you value me by paying me fairly, not reducing benefits and not overburdening me with work responsibilities outside of my job description, I will not be able to remain a UMN employee. Please do the right thing for your employees.</p> <p>Respectfully, Katherine Goffin, MBA College of Pharmacy University of Minnesota Twin Cities</p>
Jessie Barnett	Schimek	Faculty, Student- Based Faculty (P&A)	<p>I would like to share strong advocacy for several of the Recommended Strategies pertaining to P&A base pay (compa-ratio of 0.88, though noted as improved when considering benefits). Recruiting and retaining high-quality colleagues is extremely difficult across the system. Bleeding talent is so detrimental to our University's mission - and by taking special initiative to retain our hard workers, we will acknowledge the U's positive impacts on our state.</p>

Interim President's Recommended FY 2025 Annual Operating Budget

Interim President Jeff Ettinger

Julie Tonneson, Interim Senior Vice President and Budget Director

Koryn Zewers, Assistant Budget Director

Finance & Operations Committee

June 13, 2024

SENIOR VICE PRESIDENT FOR FINANCE AND OPERATIONS

World Class Services for a World Class University



UNIVERSITY BUDGET

UNIVERSITY OF MINNESOTA

Changes Since Review in May

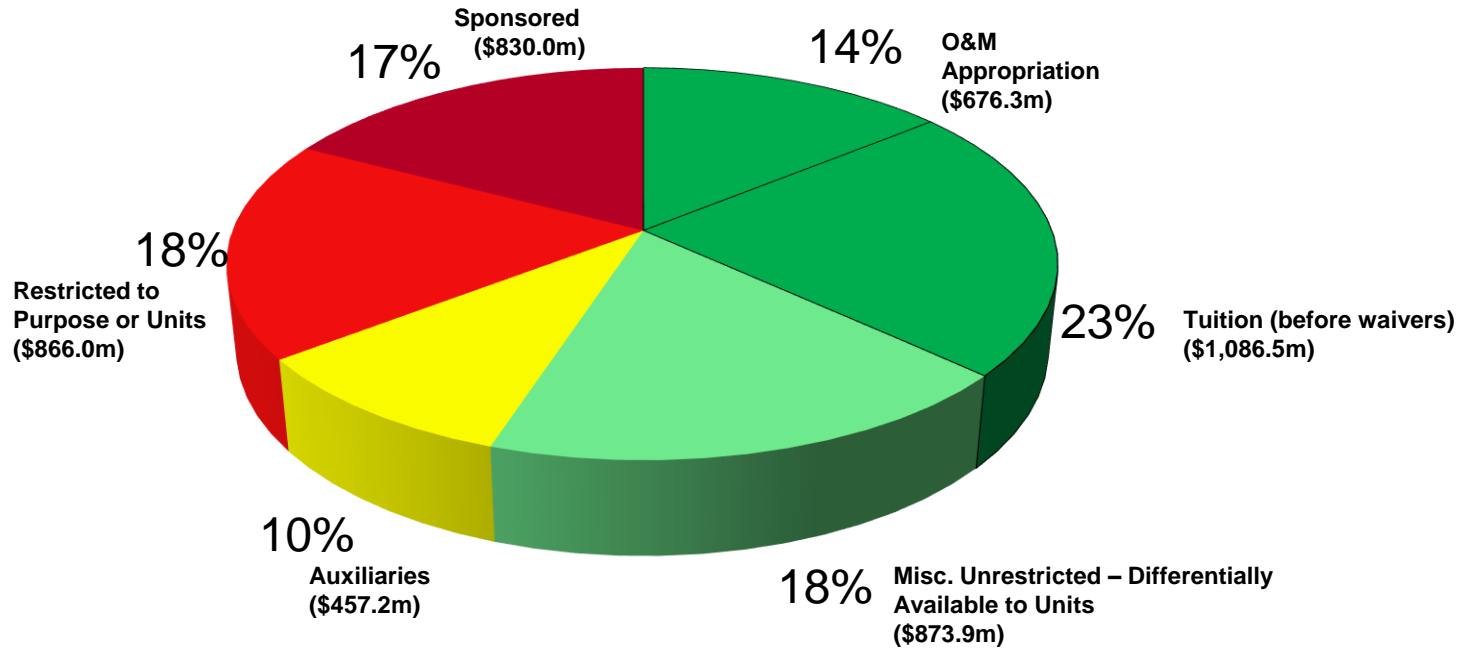
- 1) \$1.4 million in nonrecurring funds to cover half of the estimated reduction in State Grant Aid for undergraduate students from families with income between \$80,000-\$120,000
- 2) Technical corrections
 - Attachment 4: UMD Midwest Nonresident undergraduate tuition rate – added South Dakota to the listed states
 - Attachment 4: College of Liberal Arts - removed discontinued French Studies tuition rate
 - Attachment 10: Technical corrections to the distribution of unit allocations (internal transfers)



UofM Revenue Sources By Fund Category

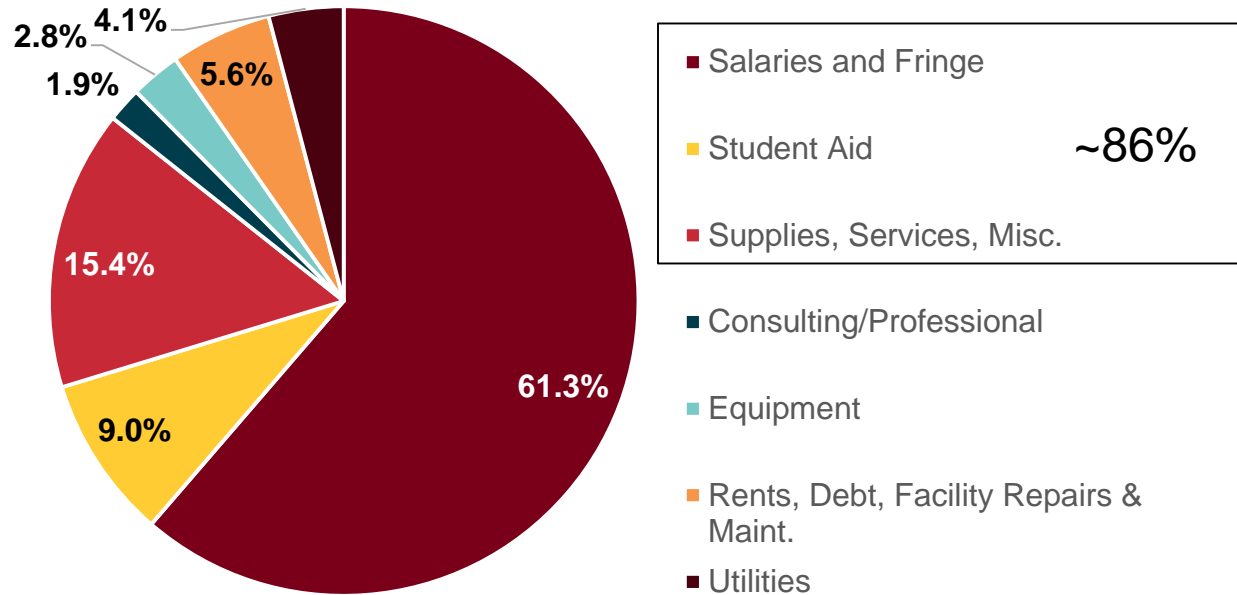
FY 2025: \$4.8 Billion – Up 3.3%

(excluding internal sales)



UofM Expenditures/Transfers Out All Funds FY 2025: \$4.7 Billion – Up 3.3%

(excluding internal sales)



Framework Overview: Resources

Framework Variable	Increment in Budget
Unit & Central Resources: Unit Reallocations & Other Revenues plus Bridging with Central Balances	\$37.5 million \$6.0 million
Tuition – Rate Increases Tuition – Enrollment Changes Tuition – Surcharge Phase in and Rate Increase	\$42.2 million
O&M Set Aside in FY24 for the FY25 Budget	\$9.0 million
Central Reallocation	\$4.5 million
Total Incremental Resources	\$99.2 million



Framework Overview: Investments

Framework Variable	Increment in Budget
Compensation	\$35.9 million
Core Operations & Services	\$19.3 million
Program Enhancements/Student Aid	\$18.1 million
FY 2024 Tuition Challenges	\$16.4 million
Facilities & Technology Infrastructure	\$9.1 million
Total Incremental Investments	\$98.8 million



The Recommended FY 2025 Budget Priorities:

- ✓ Invest to Maintain Excellence Within Constrained Resources
- ✓ Support Faculty and Staff Within These Resource Constraints
- ✓ Improve Efficiencies and Re-Prioritize Activities
- ✓ Address Critical Compliance, Operating & Safety Needs
- ✓ Implement a Necessary Tuition and Fee Plan
- ✓ Incorporate Responsible Revenue and Expenditure Projections

✓ **Balance the Budget**





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BOARD OF REGENTS DOCKET ITEM SUMMARY

Finance & Operations

June 13, 2024

AGENDA ITEM: PEAK Implementation Update

Review

Review + Action

Action

Discussion

This is a report required by Board policy.

PRESENTERS:

Kenneth Horstman, Vice President, Human Resources
Michael Volna, Interim Vice President

PURPOSE & KEY POINTS

The purpose of this item is to provide an update on the progress of the PEAK Initiative (Positioned for Excellence Alignment, and Knowledge). The PEAK Initiative is preparing to implement Phase 2 in late 2024. The discussion will focus on progress on the implementation plan, including:

- lessons learned from Phase 1, along with the specific actions being taken to address stakeholder feedback;
- summary of early Phase 1 metrics;
- update on Phase 2 implementation progress;
- model shift from Huron-led effort to University of Minnesota-led effort; and
- preview of PEAK's next steps coming later this year.

BACKGROUND INFORMATION

The PEAK Initiative is a systemwide effort to help fulfill the MPact 2025 Systemwide Strategic Plan commitment to fiscal stewardship by promoting access, efficiency, trust, and collaboration with the state, University leadership, faculty, staff, students, and partners. PEAK aims to advance the University's teaching, research, and outreach mission by identifying opportunities across non-academic functions to reduce costs while retaining excellent service.

Guiding principles of the PEAK Initiative include:

- Equitable & Inclusive – consciously and intentionally includes and advocates for diverse populations.
- Integrated – seamless connections with other systems and processes.
- Agile – flexible to accommodate evolving needs and strategies through iterative improvements.
- Operating Efficiency – implement approaches that will drive value in support of the University's mission.
- Digitally Enabled – simplify repetitive administrative tasks and enable focus on high-value strategic and consultative activities through technology enablement.

- Consistent – foster an experience of one University, supporting harmonization through simple and transparent processes.

The Board previously discussed this topic at the following meetings:

- December 2023: *PEAK Implementation Update*, Finance & Operations Committee
- June 2023: *PEAK Implementation Update*, Board of Regents
- February 2023: *PEAK Implementation Update*, Finance & Operations Committee
- December 2021: *PEAK Action Plan*, Board of Regents
- October 2021: *PEAK Implementation Plan*, Board of Regents
- September 2021: *Update on PEAK Initiative*, Board of Regents
- July 2021: *Report on PEAK Initiative*, Board of Regents

PEAK Implementation Update: Positioned for Excellence, Alignment & Knowledge

Ken Horstman, Vice President, Human Resources
Michael Volna, Interim Vice President, Finance

Finance & Operations Committee

June 13, 2024



Agenda

- PEAK Overview
- Progress and Learnings from Phase 1
- Phase 2 Implementation Update
- Shift in Model with Huron
- Next Steps
- Questions



PEAK Initiative

PEAK is a strategic initiative that transforms how we administer critical services across Finance, Human Resources, Marketing and Communications, and Information Technology to **increase consistency, find new efficiencies, and reduce risk systemwide.**

Advancing Pact 2025 Goals

Student
Success

Discovery,
Innovation &
Impact

MNtersections

Community &
Belonging

Fiscal
Stewardship



Looking at our peers



Many institutions are reinventing administrative functions to drive transformational efficiency.



Phase 1 Progress: 6 months of operations

Finance

21,856 requests processed

99.8% of transactions resolved in agreed time frame

91% satisfaction rate

Human Resources

10,350 requests processed

96% of transactions resolved within agreed time frame

93% satisfaction rate

Decreased time to fill positions by **43%**

Marketing Communications

7 major web development projects underway

100% of requests responded to within agreed time frame

Developed **10** new analytics dashboards for Phase 1 units

Information Technology

8 virtual team projects underway, giving **76** IT employees from **27** units across the system development opportunities



Our People

More than a service model change, PEAK promotes **opportunity for collaboration, flexibility, and growth for our people.**

Phase 1 Highlights

- 30 positions offered through Expression of Interest (EOI)
- **0 positions lost** due to PEAK
- Over 2,400 hours of HR Ops Center, Talent Acquisition, and Finance Ops training completed
- **Welcome Event:** 150+ Phase 1 leaders and staff attended a two-day event at Duluth to focus on team building and readiness for the transition of services on December 4th.



In October, I was able to move into a PEAK role that specifically supports Talent Acquisition efforts on the Duluth campus. Since the move, I've been able to contribute to recruitment efforts, as well as refine my skills in the HR space. This job change has had a **positive impact on both my professional development and my sense of purpose** working at the University of Minnesota.

-Marguerite Gallagher, Sr. TA Specialist

New program engagement model



More partnership



More engagement on service model and budget



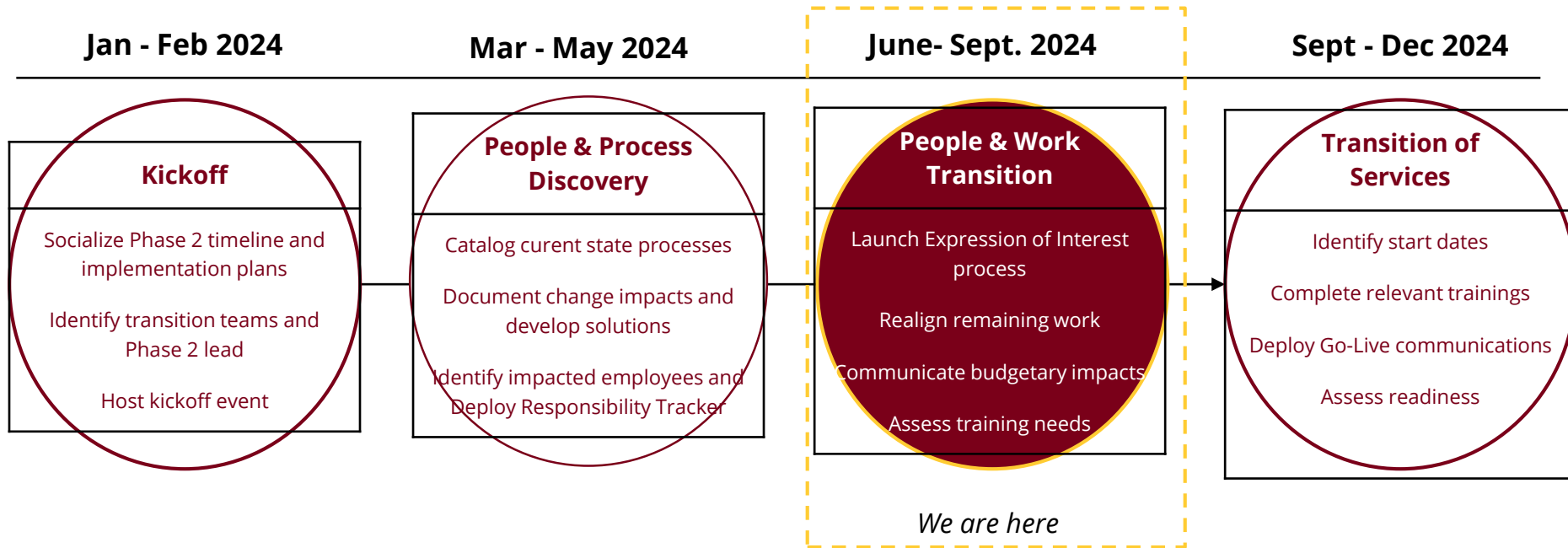
More communications and change management support



More support and information for employees making big decisions

Phase 2 Implementation: Project Recap

Implementation is the process for the identification and transition of people, work and services from academic and administrative units to central teams.



Purposeful Shift in Huron Partnership

The University continues to develop internal resources and decrease the level of external support.

Phase 1 Huron Co-Led	Phase 2 UMN-Driven
<ul style="list-style-type: none">• Huron provided interim PEAK Project Office leadership (e.g., program director, change manager, functional managers)• Huron co-led Workforce Transition in partnership with UMN External & Labor Relations• Huron co-led and facilitated engagement with central, campus, college, and unit stakeholders	<ul style="list-style-type: none">→ UMN staffing PEAK Project Office (e.g. program management, communications and change management support)→ UMN now leading Unit Transition work combining process and people transitions→ UMN will lead and facilitate engagement with central, campus, college, and unit stakeholders



Next Steps

1 Complete People Transition steps

2 Prepare for Phase 2 December Go-Live

3 Initiate Future Phase Planning



Continue to support our people

Our engagement survey highlighted that we have an opportunity to create a more supportive environment for our people.

When asked what would make employees more successful at work, the most common themes included:

- Operational efficiency
- Training and development
- Opportunities for cooperation and teamwork



“When asked about the one thing that faculty and staff would like to change to enable them to be more successful at work, the leading response was operational efficiency. PEAK is an opportunity to increase operational efficiency, and to create a supportive environment.”

Dr. Rachel Croson, Executive Vice President and Provost

Questions?



Appendix



Finance Operations



Rahfat Hussain
Director
Finance Operations
Center

Gary Nelson
Accounts
Receivable Manager

Doug Ahlgren
Senior Purchasing
Manager

Jenni Larson
Accounting
Manager

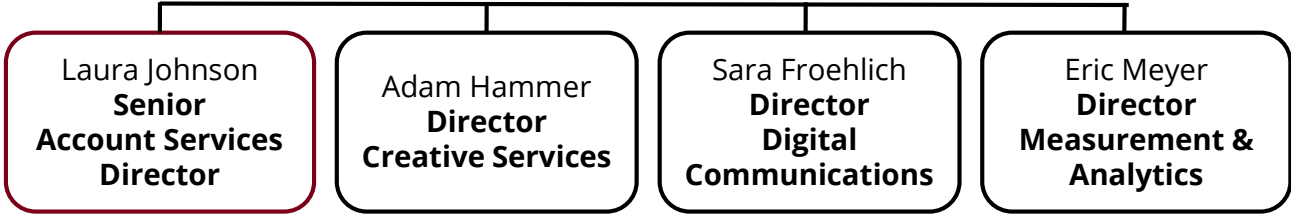
Services
General Ledger Accounting
Payroll Accounting
Accounts Receivable
Purchasing
Accounts Payable

“This was a great experience. Everything was taken care of quickly and even though I wasn't able to provide complete information the specialist was able to complete the request asap.”

Marcom Common Good Services



Laura Johnson
Senior Account
Services Director



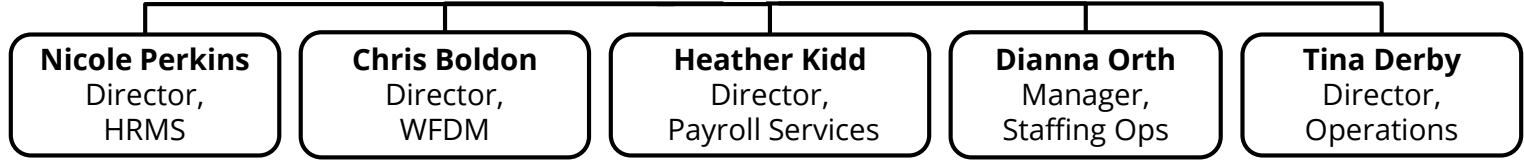
Common Good Service Areas
Account Services Project management, strategy and consultation for: websites, search engine optimization, user experience, marketing planning, brand alignment, social media strategy, and paid advertising
Creative Services Graphic Design, Multimedia Production, Written Content, Copyediting, Digital Creative & Execution
Digital Communications Web Planning & Strategy, Web Development, User Training
Measurement & Analytics Measurement & Strategy, Platform Optimization and Maintenance, Dashboard Creation and Maintenance, Data Consultation

“Common good services have **strengthened our partnership** with UR so we’re more strategic, focused, and aligned in our communications. We’ve **tapped into the expanded expertise** that UR offers and are excited about our upcoming projects in our service level agreement.” - **Phase 1 Marcom Lead**

HR Operations



Amy Kucera
Senior Director
HR Operations



Service Areas Supported
HRMS System support, Project management, Reports
Workforce Data Management <i>Employee Information management</i> , business intelligence, data audit, training services
Payroll Services Payroll, tax, and time and absence/attendance
Staffing Operations <i>Post & Hire</i> - Handoffs with Talent Acquisition COE
Operations Contact center, Benefits Admin, <i>Leave of Absence</i>

“Great job! Thank you for processing my request so quickly. I appreciate the updates to show the request was completed!!”

- Phase I HR Director

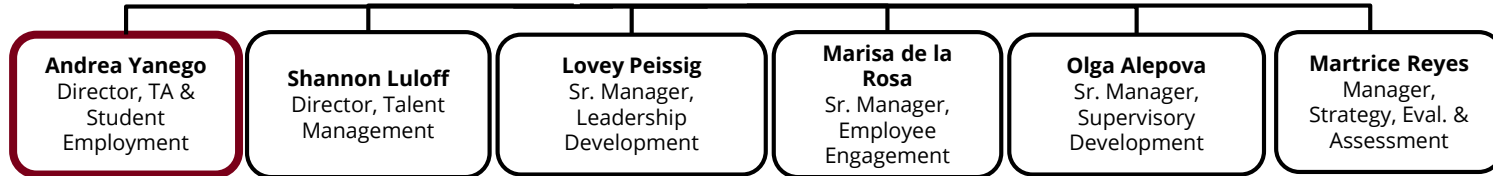


Talent Strategy Center of Expertise



Andrea Yanego
Director for Talent Acquisition and Student Employment

Brandon Sullivan
Senior Director for Talent Strategy



Services
Full-cycle recruitment support <ul style="list-style-type: none">• developing a timeline• developing and executing on a marketing plan• passive applicant sourcing• writing an inclusive job advertisement• offer management
Reviews background checks

“Talent Acquisition was instrumental in preventing the closure of Dining Services. With their support we were able to fill multiple vacancies in a short period of time.”

-Phase 1 leader





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BOARD OF REGENTS DOCKET ITEM SUMMARY

Finance & Operations

June 13, 2024

AGENDA ITEM: Rochester Campus Plan

Review

Review + Action

Action

Discussion

This is a report required by Board policy.

PRESENTERS: Lori Carrell, Chancellor, Rochester Campus
Greg Havens, Principal, Sasaki Associates, Inc.
Monique MacKenzie, Director of Campus Planning
Shane Stennes, Chief Sustainability Officer

PURPOSE & KEY POINTS

The purpose of this item is to review the Rochester Campus Plan, the core components of which (Drivers, Principles, Big Ideas, and Implementation) are included in the docket along with supporting narrative, imagery, and illustrations of future opportunities related to recommendations on the Rochester campus. Supplemental material on the Rochester Climate Action Plan is also provided for reference and in support of the goals of the Campus Plan.

BACKGROUND INFORMATION

Board of Regents Policy: *Reservation and Delegation of Authority*, Article I, Section VIII, Subd. 5 states: "The Board reserves to itself authority to approve campus plans and amendments thereto." Board engagement on this plan has occurred at the following meetings:

- May 2024: *Enrollment Strategy Plans and Financial Impacts: Crookston, Duluth, Morris, Rochester*, Board of Regents
- February 2023: *Progress Toward MPact 2025 Enrollment Goals: Rochester*, Mission Fulfillment Committee
- March 2021: *Campus Strategy: UMR*, Board of Regents
- February 2021: *Systemwide Strategic Plan Implementation: Systemwide Campus Master Planning Principles*, Finance & Operations Committee
- December 2020: *Systemwide Strategic Plan Implementation: Principles to Guide Campus Master Plans*, Finance & Operations Committee



UNIVERSITY OF MINNESOTA



University of Minnesota Rochester Campus Plan

Draft for Review - June 2024

Reviewed by the Regents of the University of Minnesota

June 13, 2024

The University of Minnesota Rochester's Land Acknowledgement

The University of Minnesota Rochester is located on the traditional, ancestral, and contemporary lands of the Dakota, Ho-Chunk, and other Native peoples. By offering this land acknowledgment, we affirm tribal sovereignty and will work to hold the University of Minnesota Rochester accountable to American Indian peoples and nations.

Contents

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4	Planning Principles	30
5	Planning Vision: Big Ideas	34
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CHATEAU

UMR RAPTORS

CONGRATULATIONS GRADUATI



Introduction 1

Purpose of the Campus & Climate Action Plans Framework

A Systems Approach

The University of Minnesota System is developing an integrated set of Campus and Climate Action Plans to align the future of each campus with systemwide goals. The coordinated plans will ensure alignment between physical place-based changes and climate action commitments at all campuses. The purpose of each set of plans is to develop consensus around a shared vision for the future of the campus, and to identify actionable steps for supporting its mission and goals.

Each campus of the University of Minnesota System plays a pivotal role in fulfilling the tripartite mission of the University, advancing learning, research, and outreach throughout Minnesota. Each has its own unique identity, valued by students, faculty, staff, and the surrounding community. This integrated planning effort provides each campus with a framework for future decision-making and implementation to support each individual institution's needs while advancing goals identified in the systemwide strategic plan, MPact 2025.

Campus and Climate Action at University of Minnesota Rochester

The University of Minnesota Rochester (UMR) offers students an unparalleled education in the health sciences, including an integrated, hands-on curriculum, personalized attention, and a learning experience that is truly one-of-a-kind. Immersed in the heart of one of the nation's most health-focused communities, students engage with medical professionals on a daily basis and graduate prepared to transform knowledge into discovery in the ever-changing world of health care.¹

Combined, the Campus and Climate Action Plans support UMR's commitment to excellence sustained through managed enrollment growth. In doing so, the plans identify the time horizons and criteria for strategic decision-making toward a phased approach to facilities expansion.

The University of Minnesota Rochester's coordinated Campus and Climate Action Plans articulate a vision and key recommendations for the campus over the near- and long-term. Three key goals of UMR's coordinated approach include:

- Advance MPact 2025's systemwide commitments to build a fully sustainable future and develop a comprehensive long-range capital facilities and landholding strategy to drive strategic growth.
- Support UMR's Bluff Top View strategy for enrollment growth and systemwide commitment to carbon neutrality by 2050 or sooner by developing principles to guide decisions about the physical campus: facilities, spaces and landscapes to support teaching and

¹ https://university-relations.umn.edu/sites/university-relations.umn.edu/files/2023-01/System_style_guide-11-22.pdf

learning, student life, mobility, and community connections.

- Explore existing and potential partnerships to meet shared goals around both UMR's Vision and systemwide sustainability goals. Explore public-private partnerships as a strategic way to deliver capital projects.

This report presents an overview of plan drivers, existing campus conditions, and community input. The information gathered during this process informed nine "Big Ideas" for the University. These Big Ideas are strategic opportunities for meaningful improvements to student support, space efficiency, and community experience at UMR over near-term and long-term time horizons. The Big Ideas are followed by finer-grain recommendations, which present a vision for how campus improvements may be made over time.

University of Minnesota Rochester Vision

The University of Minnesota Rochester will inspire transformation in higher education through innovations that empower our graduates to solve the grand health challenges of the 21st century.²

² <https://r.umn.edu/about-umr>



**Students are at the center.
Research informs practice.
Partners make it possible.**





Existing conditions and major projects under construction in 2024

- Education District Land
- UMR Leased Facilities
- UMN Owned Property
- UMR Leased Parking

2014 UMR Campus Plan

The most recent UMR Campus Plan was completed in 2014. Developing a physical and implementation plan for the Education District was the primary objective at that time. With the closure of the YMCA – a key UMR partner with a planned joint facility in that district – the earlier plan was significantly impacted. Further, while the COVID-19 pandemic affected the YMCA and small businesses downtown, Rochester’s recovery is remarkable as contrasted with the downtowns of many similarly sized cities. This update to the Campus Plan includes new recommendations for the Education District. Unlike the 2014 plan, this plan also recommends strategies for continued UMR growth in Rochester’s downtown.



2014 UMR Campus Plan

Planning Process

The UMR planning process for both the Campus and Climate Action Plans progressed from September 2023 through May 2024 and included the following phases of work.

Phase 1: Analysis and Visioning

During the initial Analysis and Visioning phase, the planning team explored existing conditions, reviewed past planning efforts, integrated MPact 2025 goals, and gathered input from stakeholders including the campus community, community partners, and an Advisory Committee of faculty, staff and student representatives. The Chancellor’s office hosted nearly two dozen follow-up meetings with external partners to explore shared goals in detail. A key component of this phase was an interactive online mapping tool called MyCampus. All students, faculty and staff were invited to contribute. (See “Campus Community Input” section.) The results highlighted primary concerns and issues on campus. To solicit feedback for future scenario development, findings of all engagement and analysis from this phase were presented to the Advisory Committee in October and two campus-wide Zoom forums in November.

Phase 2: Scenario Planning

Based on the outcomes of Phase 1, the planning team developed a range of potential approaches to address campus needs and partnership priorities. During this process, the planning team worked to find consensus among campus leadership and stakeholders on projections of future trends, including enrollment growth, space needs, climate action, and other factors that impact campus activities, facilities, and infrastructure.

In early December 2023, the planning team held an interactive workshop with faculty, staff, and students to review three potential scenarios for the future of the UMR campus. Focus meetings with external partners also gathered feedback on potential scenarios. An important conclusion of this phase was recognizing that, because UMR and the surrounding community context are in a period of dynamic growth, the plan would provide a kit of strategic decision-making tools, rather than one discrete scenario. Flexibility and adaptability are core to this plan.

The planning team held several additional workshops with UMR leadership in early 2024 to synthesize all analysis and engagement to date and to develop preliminary recommendations. UMR leadership and the Advisory Committee offered input on preliminary recommendations at meetings in January and February.

Phase 3: Draft Plan

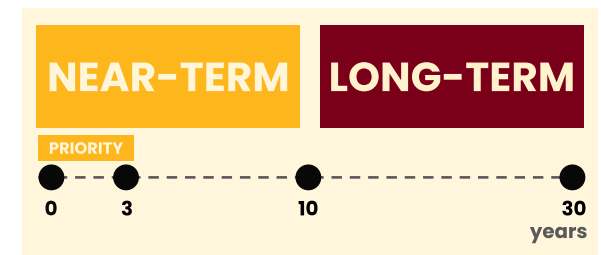
In late February and March 2024, the planning team assembled preliminary recommendations into a set of Big Ideas and presented the material on campus at an all faculty-staff CommUnity Dialogue meeting and two open house meetings. Comments and feedback from these sessions were integrated into the final plan.

Phase 4: Final Plan

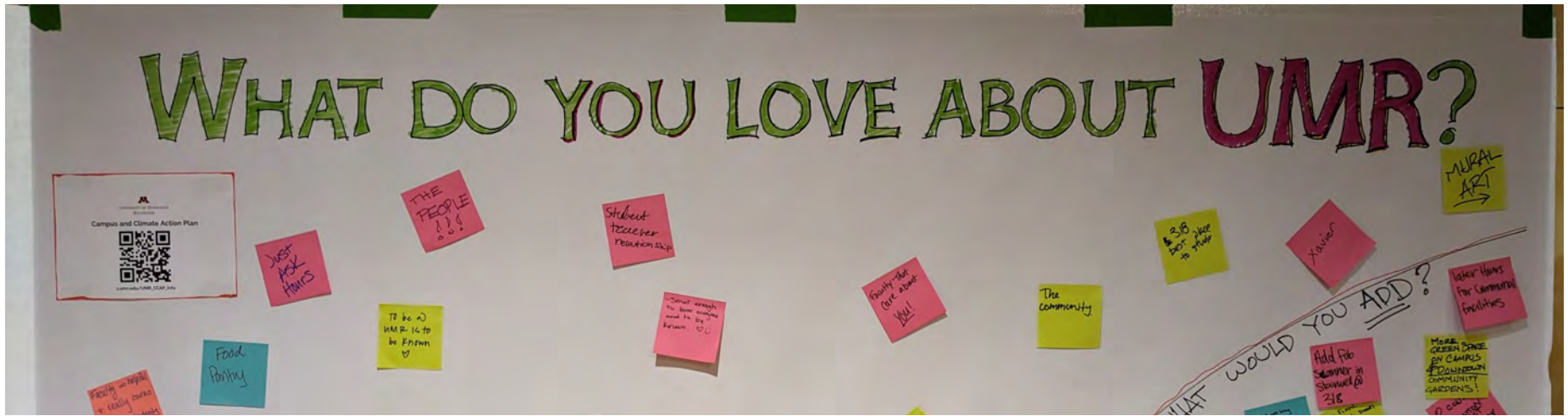
During the final project phase in April and May, the team gathered feedback from UMR stakeholders and University leadership on the draft Campus and Climate Action Plans, which informed final revisions to the plans’ recommendations. The team prepared the final report document in both digital and print-ready formats for review by the Board of Regents in June 2024.

Plan Horizon

The near-term horizon for the Campus and Climate Plans is ten years, through 2034. However, the plans also recognize several immediate UMR priorities over the next 1-3 years, when UMR projects enrollment will exceed the Bold goal of 1,000 students. Other recommendations for physical change are linked to a long-term horizon through 2050. Updates to the plan will occur approximately every ten years both to support evolving needs and priorities for the UMR campus and to respond to opportunities among partners in Rochester.



The near-term is defined as 0-10 years, while the long-term defines the next 30 years. To maintain UMR’s growing enrollment, some priorities should be implemented in the next 1-3 years.



A variety of in-person and virtual workshops were held throughout all phases of the planning process. Input from each of them guided the recommendations in this plan.

Campus Community Input

Consistent with the Regents' approved campus planning principles, the planning work completed for UMR was designed to ensure an inclusive, accountable planning process. Engagement opportunities in various formats were designed to connect with UMR's diverse community of students, faculty, staff, and external partners.

Advisory Committee

An Advisory Committee comprising student representatives, faculty, and staff convened monthly with the planning team to review the planning scope, to advise on engagement and communications plans, to discuss findings, and to comment on draft recommendations. Committee members also attended on-campus engagement

events to help the planning team gather feedback from the campus community.

MyCampus

At UMR, "research informs practice." To understand UMR's current state, the planning team gathered typical data on facilities and enrollment, and assembled a map of the many city-building initiatives shaping UMR's context in Rochester. The team engaged the campus community through an interactive mapping website, MyCampus, which asked respondents to designate places of significance (live, eat, study, work, and play, among others) and to add comments about their personal experiences.

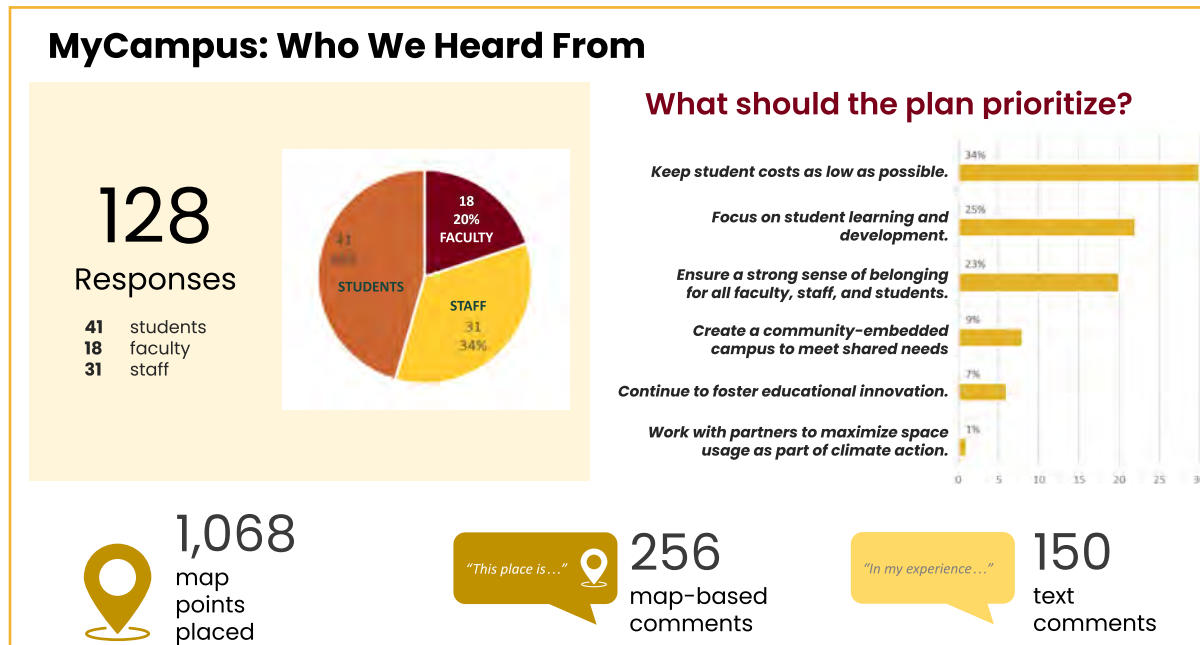
UMR Communications staff promoted MyCampus through campus-wide emails, social media posts, hallway video screens, posted flyers, weekly newsletters, and announcements in large assemblies. MyCampus was open for two weeks in October,

2023. All 1,035 students, faculty and staff were invited to participate. A total of 128 individuals responded by marking more than 1,000 campus locations and sharing more than 400 comments. Of respondents who identified themselves, 46% were students, 34% were staff, and 20% were faculty.

In-Person & Virtual Engagement

At UMR, "students are at the center." The planning team prioritized engaging the campus community - especially students - in the planning process through virtual and in-person touch points. Key among these were two in-person open house meetings: one in December to share analysis findings and to preview potential scenarios, and another in March to gather feedback on draft recommendations. UMR Communications staff promoted the meetings to all students, faculty and staff through multiple communications channels. Attendees shared feedback with the planning team in discussion and written comments, all recorded directly on display materials using Post-it notes.

Beyond student representation on the Advisory Committee and attendance at open house meetings as described above, the planning team sought out contact with students to hear their perspectives. Early in the process, information tables in student common areas helped build awareness, and a meeting with Rochester Student Association (RSA) leadership clarified student priorities. RSA also co-promoted MyCampus and other engagement opportunities. In October and November, the planning team solicited comments on their data-analysis findings and MyCampus summary in several formats, including two dedicated Zoom forums, a monthly meeting attended by all faculty and staff, the Chancellor's annual State of the Campus address, and the project website. Finally, a student team from the class "CLI 3522: Community Collaboratory" even adopted the CCAP as their

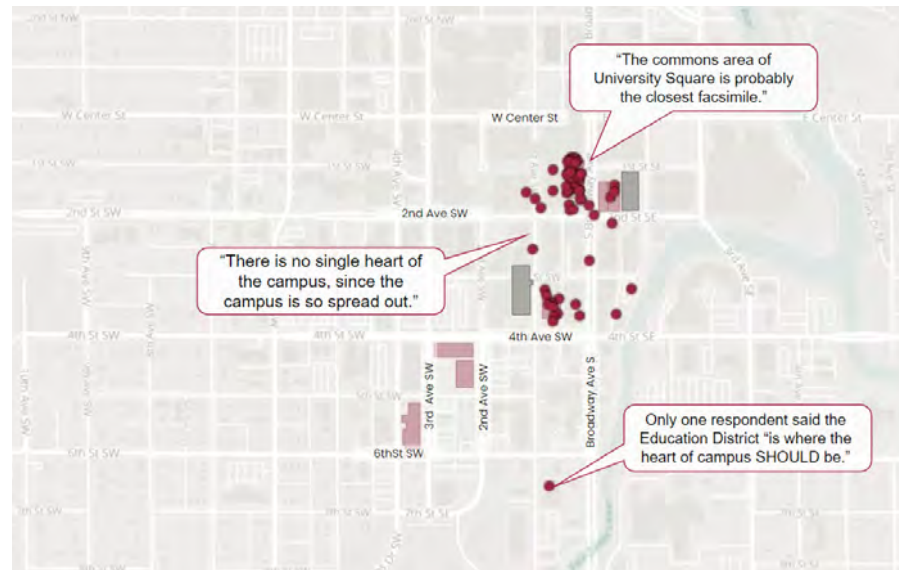


class project. The planning team advised the students as they adapted MyCampus questions for use in focus groups with their peers and a targeted survey. The student team's findings, which echoed what the planning team heard from MyCampus respondents, were presented at a class symposium in April.

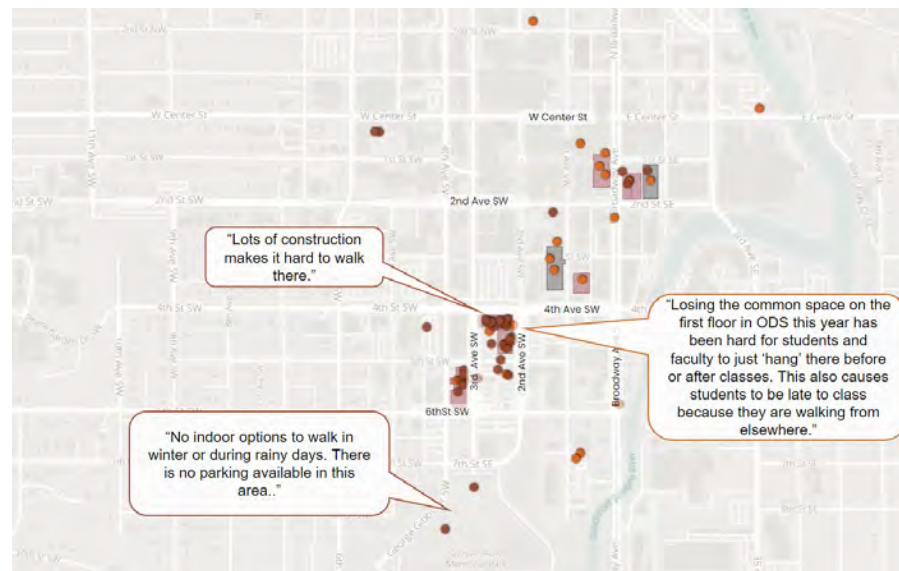
Community Partners

At UMR, "partners make it possible." UMR is part of a broad network of partners across the city and the region. Some of these partners support UMR's mission and operations by managing buildings where UMR leases space, and others provide services such as student recreation or health and wellness clinics. Still others, such as higher-education institutions from around the region, team with UMR to develop shared curricula and instructional facilities. Two open house meetings were held specifically for external partners - one to introduce the project and one to share draft recommendations for comment, each attended by more than 50 people including executive leadership and operations staff. The planning team also met individually with nearly two dozen of UMR's existing and prospective partner organizations to explore opportunities for shared visions, facilities, and programs. The team met with key partners such as Mayo Clinic's Education Shield, Destination Medical Center, and the City of Rochester several times throughout the process.

Below: Sampling of results from the MyCampus mapping activity: each point is a marker placed by a campus community survey-taker.



What do you consider the heart of campus?



Where is it difficult to get to? Which places need improvement?

Acknowledgments

This Campus and Climate Action Plan benefited from broad engagement with the UMR community of students, faculty, staff, and UMR's many partners. Thank you to UMR leadership for sharing invaluable data and guidance to shape the Plan. Thank you especially to Chancellor Carrell for convening UMR's community partners to participate in the planning process.

Chancellor

Lori J. Carrell, PhD

Advisory Committee

Co-Chair: Virginia Wright-Peterson, Vice Chancellor for Finance and Campus Resources

Co-Chair: Barry Standorf, Facilities & Operations Director

Daneille Awere, Rochester Student Association Student Body Representative to the Global Connections Community

Jered Bright, Senior Teaching Specialist, CLI

Jenny Casper, Interim Assistant Vice Chancellor for Student Success, Engagement and Equity

Norman Clark, Sr Dir of Academics

Javier Gutierrez, Assistant Vice Chancellor for Student Success, Engagement, and Equity

Paul Hanstedt, Vice Chancellor for Academic Affairs

Marcia Nichols, Associate Professor, CLI

Molly Olson, Director of Communication and Marketing

Mariah Peterson - Director of Residence Life

Mandy Phanthavilay, Rochester Student Association Student Body Representative to Staff Assembly

Chancellor's Advisory and Advocacy Council

Lori Carrell, Chancellor, University of Minnesota Rochester

Al Berning, CEO at Ambient Clinical Analytics

Gertrude Orakwue, Nurse Practitioner, Olmsted Medical Center

George Thompson, Owner of GB Thompson Solutions

Hugh Smith, Former CEO of Mayo Clinic

Jeff Bolton, Former CFO of Mayo Clinic

Mayor Kim Norton

Marilyn Stewart, Certified Residential Broker-Consultant

Mark Utz, MN Attorney, Rochester

Mohamed Addani, UMR Alumni, Ph.D Candidate - Clinical and Translational Scientist - Mayo Clinic Graduate School

Tim Penny, President/CEO Southern Minnesota Initiative Foundation

Tory Johnson, Former IBM Minnesota Senior State Executive and Vice President of Supply Chain Engineering at IBM

Walt Ling, Former Senior State Executive/Senior Site Executive, IBM (retired) Vice President, Technical support, IBM

Wendy Shannon, Chair

Students

Thank you to the many students who shared their perspectives in the MyCampus engagement tool and in conversations with the planning team.

Rochester Student Association

President Heidi Nguyen

Asmita KC, Living Learning Communities and Student Activities Coordinator

Community Collaboratory class CLI3522

Madison, Devon, Divine, Mia, and Sophia

James Thomas Ford, Student-Based Faculty

Jennifer Wacek, Senior Lecturer

Partners

Thank you to UMR's external partners who met with the planning team to provide invaluable data and insights:

City of Rochester

Mayor Kim Norton

Ryan Yetzer, Deputy Director of Community Development

Lauren Jensen, DMC Sustainability Coordinator

Scot Ramsey, Manager of Facilities and Property

Mike Nigbur, Director of Parks and Forestry

Destination Medical Center

Patrick Seeb, Executive Director

Catherine Malmberg, Director of Public Infrastructure and Strategic Development

Kevin Bright, Energy and Sustainability Director

Mike Flynn, Senior Director of Economic Development

Chris Schad, Director of Business Development

Mayo Clinic Education Shield

Brooke Wodziak, Director - Portfolio Management Office and Planning Services

Kristin Poe, Associate Project Manager - Education Strategic Planning & Portfolio Management Office

UMTC School of Nursing

Connie Delaney, Dean

Sherry Chesak, UMR Clinical Professor

Hormel Institute

Robert Clarke, Executive Director

Luther College

Jenifer Ward, President

Winona State University

Kenneth Janz, Interim President

UMN Extension Southeast

Lisa Dierks, Regional Director

Andi Sutton, Executive Director of the Southeast Regional Sustainable Development Partnership

Rochester Public Schools

John Carlson, Chief Administrative Officer

SPARK Children's Museum of Rochester

Heather Nessler, Executive Director

GH Holdings

Grant Michalet, Vice President

Hal Henderson, Principal at HGA

Titan Development

Andy Chafoulias, CEO

Jeff Bolton, Consultant

Mortenson and Colliers

Brent Webb, Development Executive

Laura Bodine, Director of Asset Management

Lindsey Thompson, Capital Markets Analyst

Mai Vang, Asset Manager

Louis Suarez, Senior Vice President (Colliers)

Landmark Development

Bob Dunn, President

Lynnette Slater Crandall, Director of Development, General Counsel

Jack Dunn, Financial Analyst

Kick-off Meeting in September, 2023

Thank you to all the partners who attended engagement meetings.

Community Partners		
City of Rochester	Alison Zelms	City Administrator
	Cindy Steinhauser	Deputy City Administrator - Development Services & Infrastructure
	Irene Woodward	Community Development Director
Destination Medical Center	Jamie Roth	Community Engagement & Experience Director
	Chris Schad	Director of Business Development
Mayo Clinic	Brooke Wodzick	Enterprise Program Manager
	Jeff Bolton	
	Doug Holtan	Chair of the Department of Facilities and Support Services
	Brad Lahr	Vice-Chair, Facilities and Support Services
	Erin Logan	Section Head of Facilities
	Randy Schubring	Manager of Communications in Community Engagement
	Guy Finne	Director, Office for Academic Partnerships
	Jess Anderson	Programs Manager/Senior Education Specialist
	Erin Sexton	Senior Director, Enterprise Community Engagement and Reputation Management
	Hormel Institute	Dr. Robert Clarke

Rochester Area Chamber of Commerce	Ryan Parsons	President
Rochester Public Library	Karen Lemke	Library Director
Cradle 2 Career	Julie Ruzek	Executive Director
University of Minnesota Extension	Lisa Dierks	Regional Director - Southeast Region
Rochester Area Economic Development (RAEDI)	John Wade	President
	Kirk Bustrom	Director of Economic Development
People's Food Co-op	Lizzy Haywood	CEO
Black Data Processing Associates (BDPA)	Ebenezer Kyei-Baffour	Executive Director
Greater Rochester Advocates for Universities and Colleges (GRAUC)	Catherine Davis	Executive Director
	Heather Nessler	
SPARK Children's Museum of Rochester		
Developers		
Sherman Associates	Dan Collison	Senior Director of Business Development and Public Affairs
	Carole Mette	Senior Developer
Landmark	Lynnette Slater Crandall	Director of Development, General Counsel at Landmark Development
Knutson Construction	Tony Joseph	Project Development Director
	Torrey Kistler	Director of Preconstruction
	Tom Leimer	Vice President
Mortenson Development	Brent Webb	Development Executive
	Louis Suarez	Senior Vice President

Kraus Anderson	Shawn Lortscher	Director of Operations
	Kelsey Vaszily	Director of Business Development
Venstar, LLC	Brenda Radichel Quaye	Owner
G&H Holdings	Hal Henderson	Principal
Blackswan (RDS)	Nick Stageberg	CEO
	Hunter Bradford	Property Manager
UMN Leadership	Leslie Krueger	Assistant Vice President, Planning, Space, and Real Estate
	Alice Roberts-Davis	Vice President, University Services
	Paige Rohman	Senior Assistant to the Vice President
UMR Leadership	Lori Carrell	Chancellor
	Virginia Wright-Peterson	Vice Chancellor for Finance and Campus Resources

Advisory Committee	Barry Standorf	Facilities & Operations Director
	Paul Hanstedt	Vice Chancellor for Academic Affairs and Innovation
	Norman Clark	Senior Director of Academic Affairs
	Mariah Peterson	Residential Life Director
	Marcia Nichols	Faculty, Center for Learning Innovation
	Andrew Caddock	Senior Planner
	Amanda Kohn	Sustainability Project Manager
	Monique MacKenzie	Planning Director
	Shane Stennes	Chief Sustainability Officer

Draft Plan Open House in March, 2024

Thank you to all the partners who attended engagement meetings.

Community Partners		
City of Rochester	Alison Zelms	City Administrator
	Irene Woodward	Community Development Director
	Ryan Yetzer	Deputy Director, Community Development
Rochester Public Utilities	Jake Shones	Plant Mechanic
Destination Medical Center	Patrick Seeb	Executive Director
	Jamie Roth	Community Engagement & Experience Director
	Chris Schad	Director of Business Development
	Lauren Jensen	Energy and Sustainability Manager
Mayo Clinic	Brooke Wodzik	Enterprise Program Manager
	Kristi Poe	Associate Project Manager - Education Strategic Planning & Portfolio Management Office
	Karen Helfinstine	Vice Chair Education Administration Assistant Professor Health Care Administration
	John Poe	
	Erin Sexton	Senior Director, Enterprise Community Engagement and Reputation Management
	Kendra Weber	Director of Campus & Student Services

Rochester Area Chamber of Commerce	Ryan Parsons	President
Rochester Public Library	Karen Lemke	Library Director
Greater Rochester Advocates for Universities and Colleges (GRAUC)	Catherine Davis	Interim Executive Director
Broadway Plaza	Scott Eggert	
	Jay Stoyles	
	Sherry Cesak	Clinical Professor
Developers		
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	Jeff Bolton	
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	Torrey Kistler	Director of Preconstruction
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	Andrew Caddock	Senior Planner
	Amanda Kohn	Sustainability Project Manager
	Monique MacKenzie	Planning Director
	Shane Stennes	Chief Sustainability Officer



Plan Drivers **2**

Planning Drivers

The Campus and Climate Action Plans are informed by a combination of key drivers. The Systemwide Strategic Plan: MPact 2025 is a planning resource common to all of the UMN System campuses, and outlines a vision for the future of the University as a whole. In addition to this document, other drivers which inform each distinctive campus plan include campus-level strategic plans and visions, preceding planning studies, community stakeholder input, and the unique set of conditions at each campus. The key drivers that inform the UMR Campus Plan are described in this section.

Systemwide Strategic Plan: MPact 2025

The UMR Campus Plan and Climate Action Plans advance the systemwide strategic plan, MPact 2025, through developing a comprehensive long-range capital facilities and landholding strategy to drive strategic growth (Commitment 5, Action Items 5.3) and developing a climate action plan to contribute to building a fully sustainable future (Commitment 2, Action Items 3.2). Many of the Plans' recommendations embody other commitments outlined in the MPACT 2025 plan, as noted below.³

Student Success

Student success is supported by many recommendations throughout the plans, in particular by the idea of creating a “Heart of the Campus” at University Square – a place where students can gather informally, find support services and amenities, and receive academic assistance at “JustASK” locations.

Discovery, Innovation, & Impact

Recommendations in the Plans support the student engagement and partnership goals of UMR with the intent of fostering discovery and educational innovation, extending opportunities for community engagement and experiential learning, and continuing UMR's role as a strong partner in downtown Rochester.

MNtersections

The Plans prioritize spaces for collaboration to serve as a model in health education while demonstrating state and worldwide leadership in sustainability.

Community & Belonging

The Plans identify strategies to develop places for UMR students, faculty, staff, and partners to gather with the goal of fostering community and belonging on campus and in the surrounding context.

Fiscal Stewardship

The Plans provide near-term and long-term strategies for optimizing building leases, creating shared programming, and aligning future facility development in the interest of UMR's sustainable future.

Board of Regents Systemwide Planning Principles

The Board of Regents approved campus planning principles in February 2021, listed below. These ensure the effectiveness of campus plans and are the foundation of Regents' review and ultimate approval of each location's Campus Plans. The UMN System has a long history of regularly updated campus physical plans, which have traditionally been known as campus master plans.

1. Establish a sustainable vision of how the physical setting of each campus will embody its distinctive history, mission, and future.
2. Create an inclusive and welcoming experience for the increasingly diverse range of people who come to campus.
3. Optimize existing physical assets to facilitate flexible and innovative solutions toward an enduring future.
4. Consider the cost of attendance, investment, and operations when planning for each campus' future.
5. Integrate each campus' master plan with the Systemwide Strategic Plan. Ensure an inclusive, accountable, and forward-looking process for developing and implementing the Campus Plan.⁴

⁴ The full text is available at <https://regents.umn.edu/february-2021-board-regents-meeting>

UMR Vision

The University of Minnesota Rochester will inspire transformation in higher education through innovations that empower our graduates to solve the grand health challenges of the 21st century.

UMR's strong mission and vision, as well as strategic growth priorities of learning, resource stewardship, collaboration and communication are significant drivers of this campus and climate action plan. The plan will continue to embody the informal UMR motto: "Students are at the center. Research informs practice. Partners make it possible."

UMR Grounding Values

UMR's community-designed "grounding values" are embedded in the UMR vision and articulate a collective belief in the transformative power of higher education.⁵ These values are the guideposts for the University's vision, and are key drivers of this plan.

Respect: We value habits of interaction that demonstrate the worth and the dignity of each person.

Human Potential: We value every person's capacity to learn, develop, imagine, create and contribute.

Community: We value collective work and a culture of trust that promotes collaboration, problem-solving, and partnerships while creating belonging, accountability and courageous action.

Diversity and Inclusiveness: We value the range of human differences and the active pursuit and involvement of varied perspectives.

Evidence-Based Decision Making: We value strategic collection and careful assessment of data to inform our choices in all matters, including student learning and development.

⁵ <https://r.umn.edu/about-umr>

MPact 2025 is specific and measurable. It has clear goals and action items. It is a guidepost for the kind of institution we want to be—and it will be adaptable to changing circumstances. Like most strategic plans, approximately 70% of this plan advances our historic mission and what we do well; 15% fixes where past practice got it wrong, or actually caused harm; and 15% promotes innovative ideas and operations. However, it is not a detailed playbook that provides an answer to every potential decision.



Commitments

Commitments represents the intersection of our values and action. They are like a spine to which all else is connected, and are intended to freely complement and interact with one another. The Commitments help us to articulate our vision at the 100,000 feet level, as well as provide direction to frame our organizational identity. The Commitments are inspiring, unifying, and impactful, but not constraining.

1: STUDENT SUCCESS

Meeting all students where they are and maximizing their skills, potential, and well-being in a rapidly changing world.

2: DISCOVERY, INNOVATION & IMPACT

Channeling curiosity, investing in discovery to cultivate possibility, and innovating solutions while elevating Minnesota and society as a whole.

3: MINTERSECTIONS

Inspired by Minnesota to improve people and places at world-class levels.

4: COMMUNITY & BELONGING

Fostering a welcoming community that values belonging, equity, diversity, and dignity in people and ideas.

5: FISCAL STEWARDSHIP

Stewarding resources to promote access, efficiency, trust, and collaboration with the state, students, faculty, staff, and partners.

Commitments of the Systemwide Strategic Plan: MPact 2025
Source: Office of the President, MPact 2025: Systemwide Strategic Plan

Student Success and Employee Well-being

Students and employees choose UMR to receive or provide a top quality health education in a high-performing, evidence-based learning environment. Classrooms and campus spaces that are energy efficient, promote health and well-being, support active learning and are decarbonized demonstrate how the physical environment contributes to personal and community health.

UMR Strategic Commitments Since 2019 Bluff Top View

UMR continues to work towards excellence while expanding its impact. Key strategic commitments in recent years that contribute to future planning considerations include the following:

- Sustain educational excellence, including equity in student outcomes;
- Grow total enrollment as delineated in the Bluff Top View plan (now in MPact 2025), using the framework of the six pathways⁶ and evidence-based practices;
- Grow resources, including:
 - Generating new revenue from industry partnerships;
 - Acquiring appropriate and affordable space;
 - Strategically hiring new human resources and supporting the growth and well-being of current employees; and
- Advance reputation as educational innovators in higher education.

⁶ <https://r.umn.edu/umr-admissions/undergraduate-admissions/bachelor-science-health-sciences/pathways>



Students studying outside of One Discovery Square.

Enrollment Goals

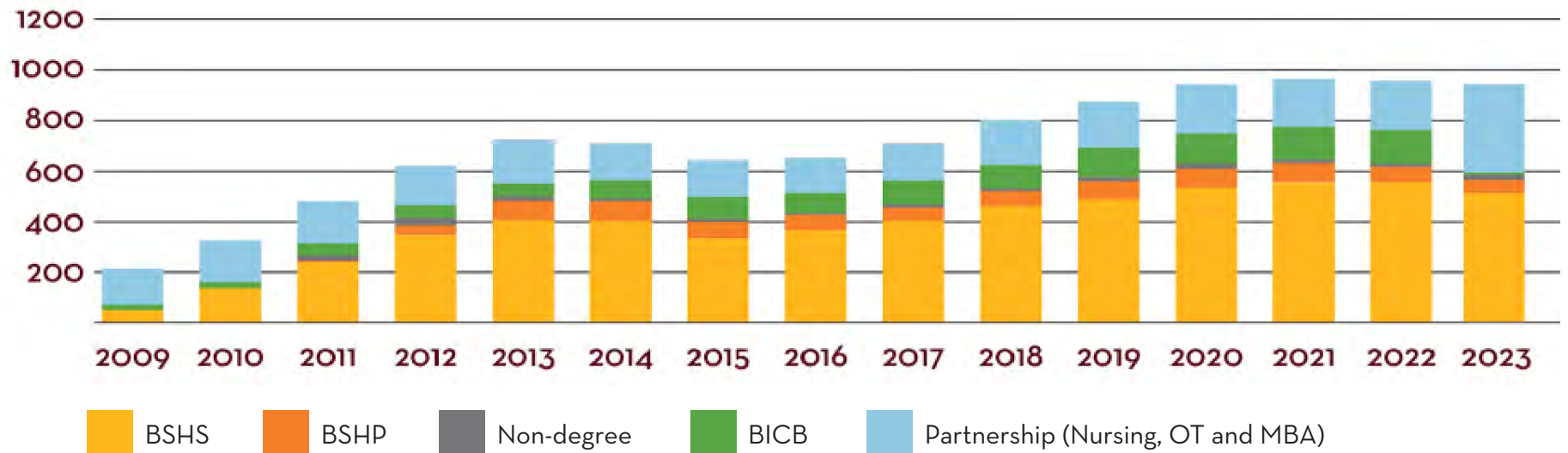
UMR has three distinct enrollment targets as identified in the 2019 Bluff Top View. Recent enrollment holds just shy of the “Bold” goal of 1,000 students served on campus. “Bolder” sets a goal of 1,500 students served on campus. “Boldest” sets a goal of 2,500 students served on campus. This plan considers the implications of all three of these enrollment growth scenarios to drive recommendations.

UMR enrollment has been trending towards growth since its inception in 2009. Despite some decline in '22-23, enrollment has remained relatively stable at nearly 1,000 students served on campus per year since 2020. UMR anticipates a strong enrollment projection for fall 2024. Consistent freshman enrollment is critical to attaining MPact 2025 enrollment goals and is the basis for a fiscally and physically sustainable campus development strategy.

BOLD	1,000
BOLDER	1,500
BOLDEST	2,500



UMR Enrollment Trends since Campus Launch.



Leasing Timelines

UMR is unique among the system campuses in that its programs are accommodated entirely within leased facilities. This provides flexibility for UMR growth and operations. The University currently leases space in the following locations:

- University Square - classrooms, labs, library, student support, and administrative hub.
- Student Life Center - a 409 bed former hotel building with a dining center, intercultural space and recreational facilities (pool, exercise facility, and multipurpose fitness room).
- 318 Commons - a residential apartment building

with 264 beds, student social space and faculty offices adjacent to a JustASK student-faculty interaction space (a “house”).

- One and Two Discovery Square - (connected buildings): multi-tenant lab and office facilities utilized for laboratory, classroom and collaborative learning space.
- Residence at Discovery Square - a residential apartment building with 47 beds.

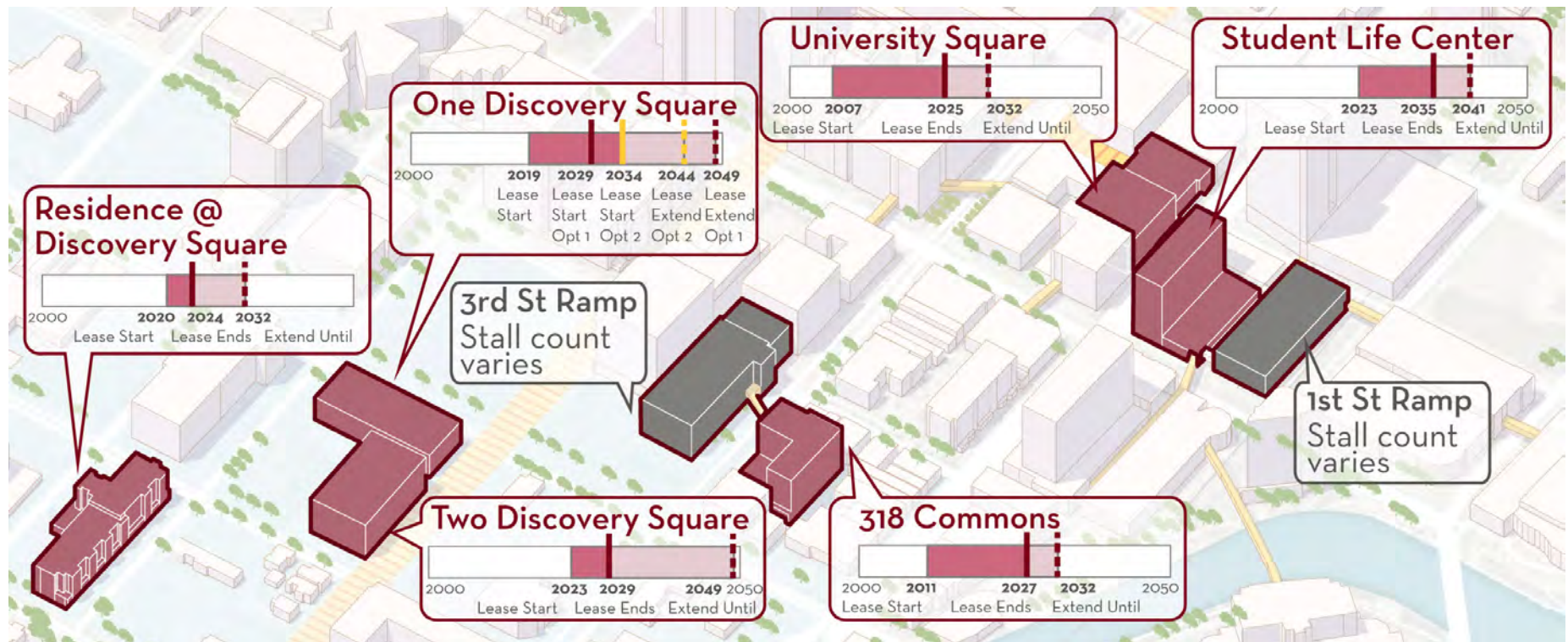
The University also leases parking space from the City of Rochester in parking ramps. The agreement provides for up to 200 spaces as UMR’s need varies on a monthly basis.

In Spring 2024, UMR utilized approximately 150 spaces in these City-owned ramps:

- 3rd Street Ramp (space count varies)
- 1st Street Ramp (space count varies)

The diagram below illustrates the lease timelines for each facility as well as potential lease renewal dates. The timing of the leases is important relative to accommodating UMR’s enrollment growth and delivering on climate action goals. Lease renewals and future lease arrangements will be guided by the smart lease approach described in Big Idea #6.

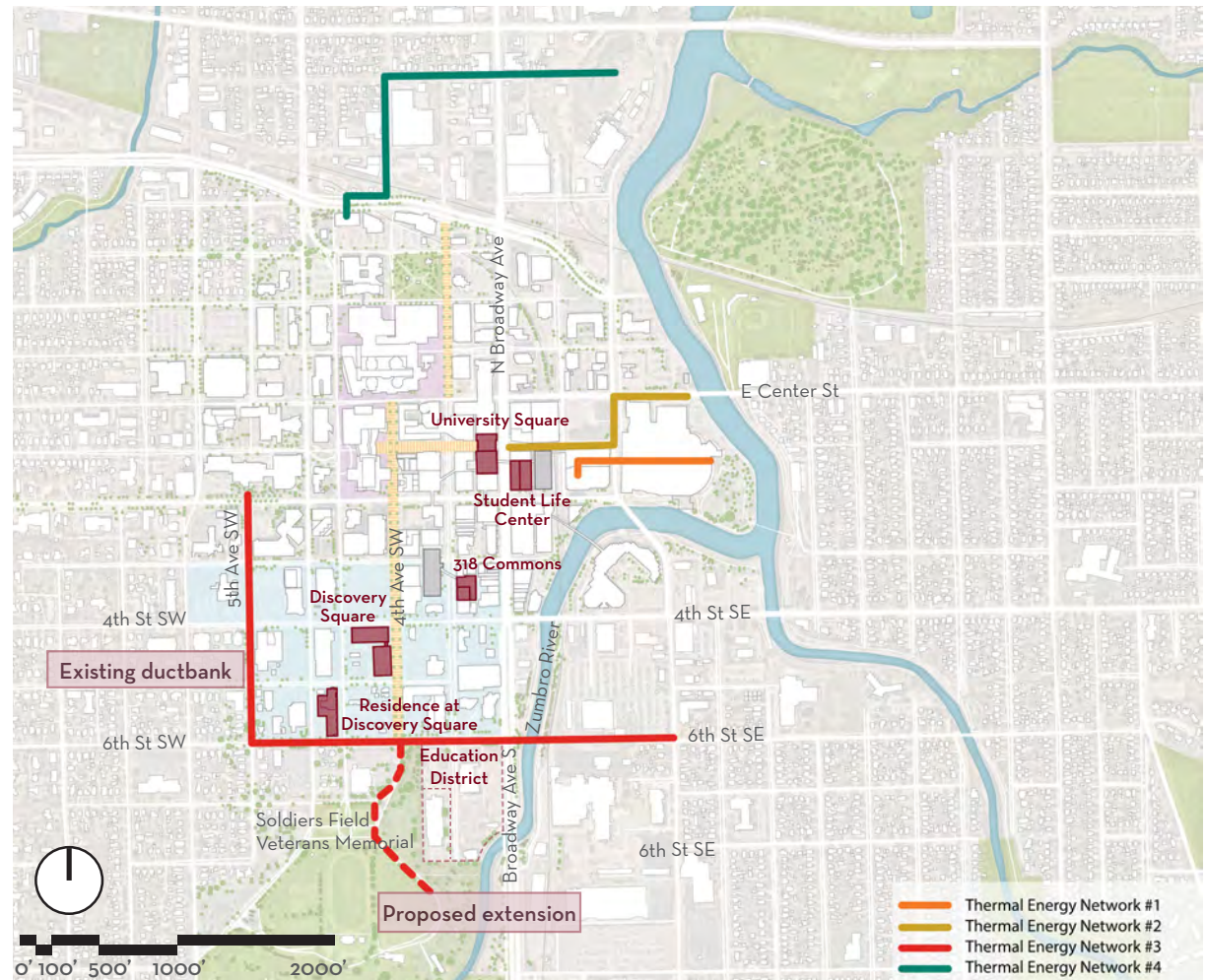
UMR Leasing Timelines



Community Climate Action Goals

UMR is not alone in its mission to envision a more sustainable future and draw down greenhouse gas emissions in Rochester. Many community partners are working towards climate action goals, both individually and collectively.

- The City of Rochester was the first Minnesota city to attain LEED Gold certification in 2018, and has greenhouse gas emissions reduction goals of 50% by 2030 and 100% by 2050.⁷ One of the ways they are working to realize these goals is through the development of a Thermal Energy Network (TEN). The future TEN will provide heating and cooling to locations around the city with an ambient loop geothermal system. The City has had success transitioning the City Hall to this technology, and is working collaboratively to develop plans for expanding the system to other parts of the city.
- One of Destination Medical Center's guiding principles is to be a model for sustainability that will strive to implement ecological urban design and building practices to improve and enhance the environment and quality of life. Strategies for achieving this include supporting clean energy and emissions reduction district-wide. The energy efficiency target cited in the DMC sustainability framework plan is a 25 percent reduction in total energy use.
- Mayo Clinic's climate action commitments, through their Better Climate Challenge, include reducing greenhouse gas emissions by 50% and reducing energy use intensity by 20% by 2032. Mayo Clinic has been pursuing energy conservation for many years, and has reduced its energy use by 20% since 2010.⁸



The City of Rochester's future Thermal Energy Network (TEN) would create an ambient loop geothermal system that could provide efficient heating and cooling to locations around the city. The City has had success transitioning the City Hall to this technology, and is working collaboratively to develop plans to expand the system to other parts of the city.

7 <https://www.rochestermn.gov/Home/Components/News/News/9204/1121>

8 <https://www.communityengagement.mayoclinic.org/environmental-stewardship>





UMR Today: Existing Conditions Analysis **3**

UMR History

This start-up, health sciences campus of the University of Minnesota began serving undergraduate students in 2009, with an initial enrollment of just over 50 students. One of only two new public universities in the country in this century, UMR approached facilities planning in partnership with the community, leasing spaces that were gradually expanded to accommodate growth. That P3 approach (public private partnership) built maintenance costs into ongoing expenses, avoiding the need for funding from the State of Minnesota’s Higher Education Asset Preservation and Replacement program “HEAPR” creating partnership and shared space opportunities to benefit students’ learning experiences. The University also partnered with the City of Rochester to purchase land for future development in the “education district” and in 2014 created its first long-range facilities plan. The COVID-19 pandemic disrupted a planned facility partnership with the YMCA, prompting a shift in focus to explore alternative options for housing and recreation expansion. As a result, a hotel was remodeled into the Student Life Center (SLC), equipped with dining and other student life facilities. The SLC became accessible to students during the 2023-2024 academic year.

UMR in Rochester: Community Context

UMR has truly grown out of the community of Rochester, and therefore has a unique relationship with its community partners. Rochester is anchored by public and private institutions allied in a unique web of partnerships committed to achieving dynamic growth downtown and in adjacent districts. UMR’s leased facilities and strategic partnerships are embedded in this dynamic context.

Mayo Clinic anchors the downtown area as the largest landowner and the state’s largest private employer. In 2024, Mayo will begin the multi-phase implementation of its \$5 billion “Bold.Forward.Unbound.” plan which will focus facilities expansion on the area immediately west of UMR.⁹

Destination Medical Center (DMC), Minnesota’s largest economic development initiative, is a 20-year plan to invest in smart growth and public infrastructure to support Rochester as a global health and wellness destination. Ten years into this plan, DMC continues to help fund and deliver many major public projects in partnership with the City of Rochester; all of which align with UMR’s vision:

- Discovery Walk, a pedestrian corridor with public art
- 6th Street bridge connecting downtown and the Education District
- Downtown Waterfront Southeast redevelopment area, a planned 13-acre transit-oriented development site across the Zumbro River from the Education District
- Discovery Square, a life-science hub focused on providing specialty spaces for medical technology companies
- The planned Thermal Energy Networks (TEN), a geothermal-based renewable energy district to bring efficient heating and cooling to public and private buildings in the Heart of the City, Discovery Square, and the Education District
- Major improvements at Soldiers Field Memorial Park
- The phased reconstruction of Broadway as a more urban, pedestrian-friendly street¹⁰.

⁹ <https://dmc.mn/mayo-clinics-bold-forward-unbound-in-rochester-initiative-a-new-chapter-for-destination-medical-center/>

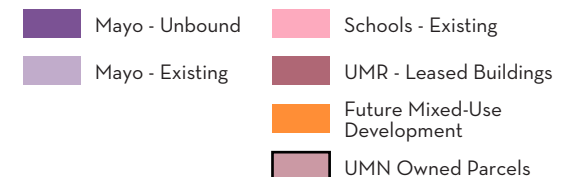
¹⁰ <https://dmc.mn/maps/>

Link Bus Rapid Transit (Link BRT) is a 2.6 mile bus rapid transit route planned for downtown Rochester. The route will connect downtown Rochester, Mayo Clinic’s downtown campus, Mayo Clinic’s Saint Mary’s campus, University of Minnesota Rochester, and the future Downtown Waterfront Southeast neighborhood at the western terminus. Link will be operated by Rochester Public Transit and will be free for all users.¹¹

The Education District comprises parcels of land purchased by the University with partial funding from City sales tax for the purposes of accommodating UMR’s expansion and partnership needs as enrollment grows. Ongoing development activity by non-University entities adjacent to the district will dramatically transform the context from what was expected in the 2014 plan. This development includes the demolition of the YMCA building to make way for a market-rate apartment complex (in-progress as of early 2024), new City of Rochester park facilities (nearing completion) and planned extension of the City’s Thermal Energy Network. Across the Zumbro River is the City’s planned Downtown Waterfront Southeast redevelopment area. A site is currently being determined for a proposed sales tax-funded sports complex that will serve the Rochester area, with an RFP to follow shortly.

¹¹ <https://linkrapidtransit-rpu.hub.arcgis.com/>

(Right) Illustrative Plan of UMR within the City Context





Link BRT

Mayo Unbound Project Area

Saint Marys Campus

Mayo Clinic's \$5B Unbound Project

Heart of the City

Future Thermal Energy Network (Yellow)

Future Thermal Energy Network (Red)

University Square

Future Thermal Energy Network (Orange)

Discovery Square

Student Life Center

Residence at Discovery Square

318 Commons

Discovery Walk

Soldiers Field Park Improvements

Soldiers Field Aquatics Center

Education District

SAP for Riverfront Development

6th Street Bridge

Soldiers Memorial Apartments

Downtown Waterfront Southeast Redevelopment Area

UMR Campus Community

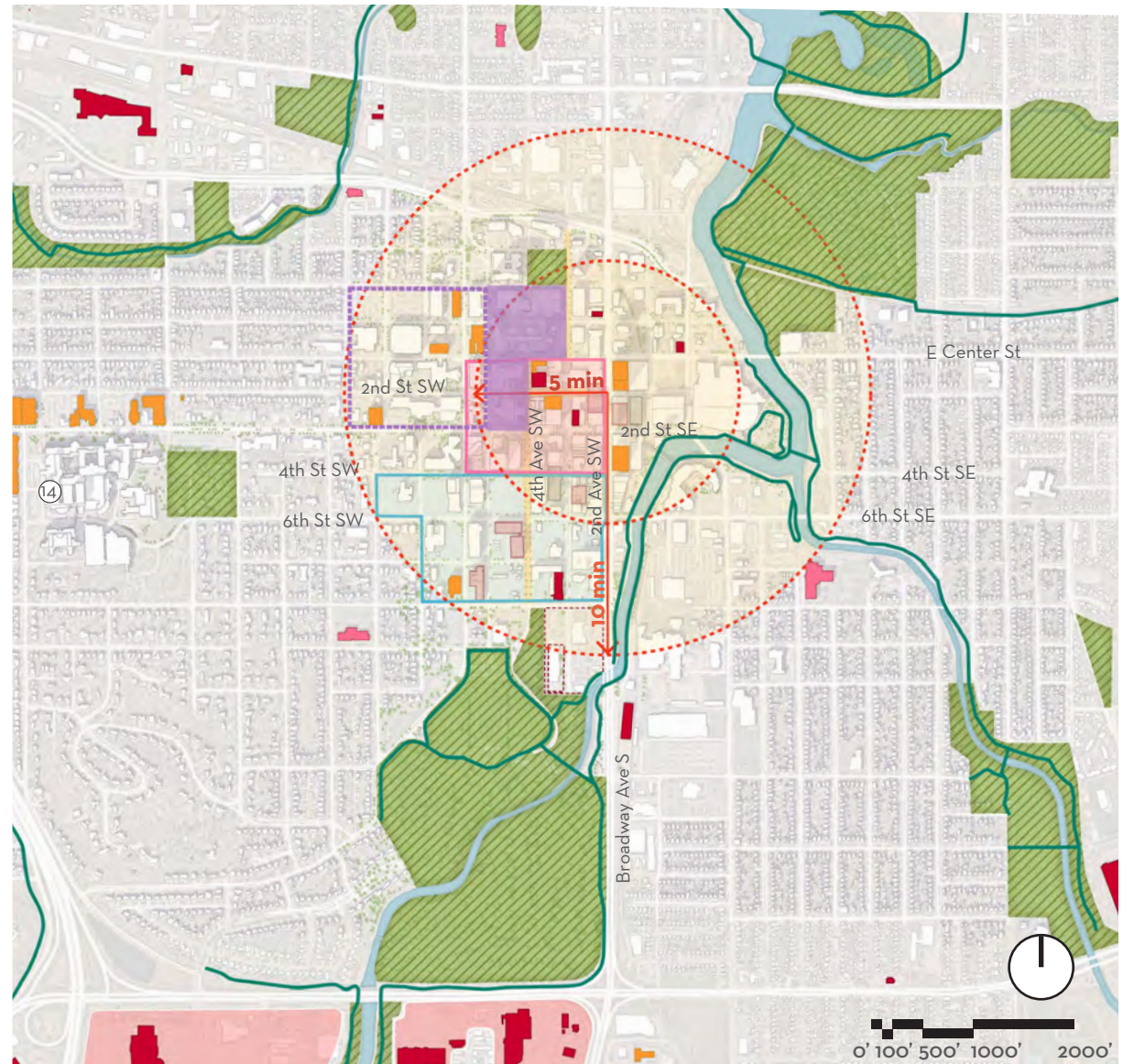
People and Enrollment

During the fall semester of 2022, UMR served approximately 964 students. Of that number, 617 were undergraduates, 101 were undergraduates in nursing partnership programs, 233 were graduate and professional students, and 13 were non-degree seeking. Ninety percent of first and second-year students live in UMR housing, most are centered at the Student Life Center. Upper division students who choose to remain in UMR housing typically favor 318 Commons and the Residence at Discovery Square for their relative independence compared with the Student Life Center. In 2023 as the new housing facility neared completion, 410 total units were occupied across UMR's three residential buildings, while 564 students lived off-campus.

UMR has a diverse student body; 68% of students are underrepresented populations. 41% are first generation college students. 42% are Black, Indigenous, or people of color; and 41% are Pell-eligible. Of the entire student body, 80% of students identify as women; 20% as men¹².

As stated in the Plan Drivers-Enrollment section, UMR has three distinct enrollment targets as identified in the 2019 Bluff Top View. The "Bold" goal of 1,000 students served on campus was nearly achieved with Fall 2023 enrollment. "Bolder" sets a goal of 1,500 students served on campus. "Boldest" sets a goal of 2,500 students served on campus. This plan considers the implications of all three of these enrollment growth scenarios to drive recommendations for future space needs.

¹² 2022 data presented to the Regents in 2023. <https://regents.umn.edu/sites/regents.umn.edu/files/2023-02/docket-mis-feb2023-final.pdf>



Five- and ten-minute walkshed from University Square.

- Schools - Existing
- Retail/Grocery - Existing
- Hotels - Existing
- UMR Leased Buildings
- Mayo - Existing

Current Facilities: Building and Space Use

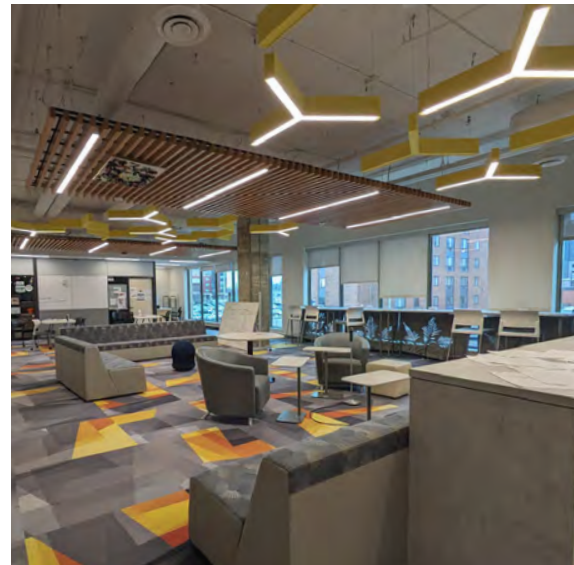
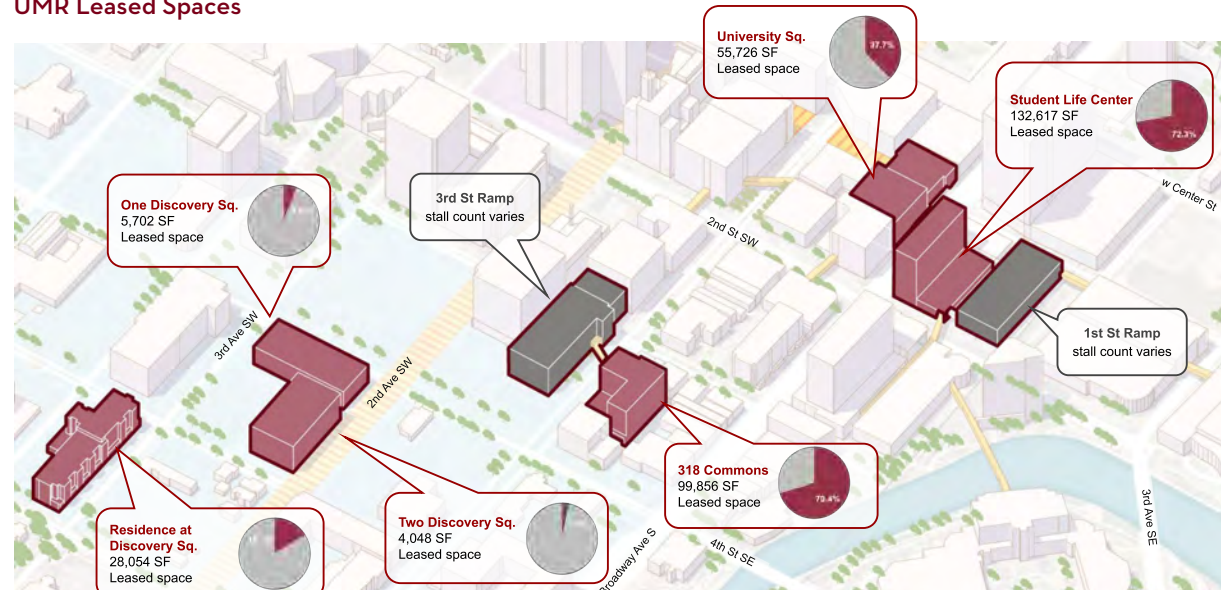
The space utilization assessment evaluated current use and occupancy levels of UMR's facilities in order to understand UMR's capacity to meet current and projected enrollment levels, pedagogical goals, and areas of strategic importance. The results of that analysis are summarized in this section.

Classrooms & Teaching Labs

Detailed analysis of UMR's current room scheduling, utilization patterns, course-enrollment goals, and active-learning practices identified a need for classrooms with capacity for 48-60 students, up to approximately 1,400 ASF each. One such classroom is needed immediately, primarily to support classes attended by UMTC Nursing students at UMR - a successful and growing aptrner program. As the number of classroom offerings increases, UMR plans to enhance utilization by increasing summer course offerings and optimizing classrooms with adequate amenities (e.g. lighting, technology, tools). University targets for utilization and scheduling also support optimized use of this asset. Beyond immediate needs for additional classroom space, other learning space demands will increase incrementally: there will be an additional demand of approximately 1,000 ASF at the Bold goal anticipated in fall 2024 and 3,600 ASF at the Bolder goal. At the Boldest goal, demand will increase by approximately 6,900 ASF.

UMR's supply of science teaching labs is generally right-sized until enrollment approaches the Boldest goal of 2,500 students served on campus. At this point, demand will increase by approximately 5,700 ASF.

UMR Leased Spaces



JustASK academic "house" space encourages faculty-student interaction, with offices and study spaces in the same location.



Active learning labs and classrooms are a hallmark of UMR's innovative educational approach.

Office Space

Currently, the demand for office space is slightly greater than the available supply. In all future scenarios, office spaces are assumed to use more efficient sizing. Future office space assumptions should follow University guidelines, currently defined as faculty offices at 120 ASF plus 42 ASF for support; staff offices assume 92 ASF plus 25 ASF for support. These numbers are averages on a continuum, which could be higher or lower during an actual design phase. Support builds in a general allocation for closet space, kitchenettes, and shared lounge space.

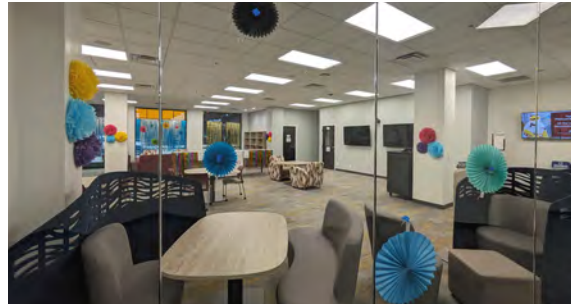
Increase in office demand will occur at the Bolder goal, with approximately 2,700 ASF additional needed as compared to today. At the Boldest goal, demand will jump by approximately 12,800 ASF additional office space.

Study Space

Currently, study spaces do not qualitatively meet student needs. Some of these spaces could be improved to optimize use, or re-allocated to other programming to support UMR goals. Demand for more study space will increase by approximately 1,000 ASF at the Bolder goal, but jump by approximately 10,000 ASF at the Boldest goal for a total of 24,600 ASF.

Campus Life

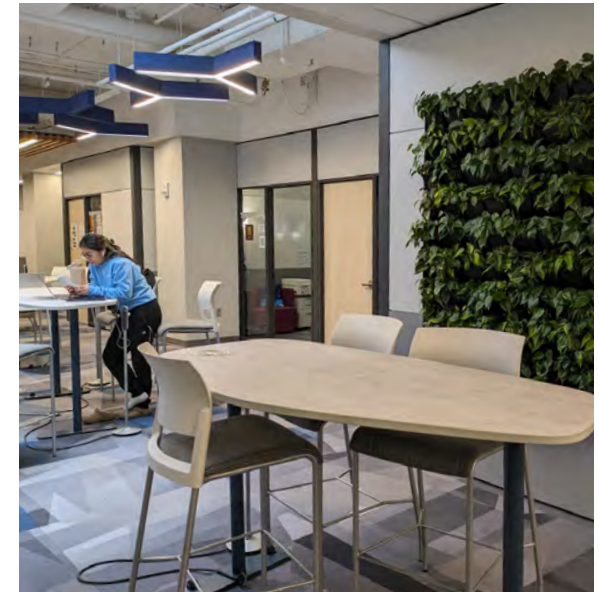
Social Spaces: Social spaces include lounges, lobbies, multi-purpose meeting rooms, and recreational spaces. The current supply needs some qualitative changes and could support the current population through the Bolder goals. It will be limited as the campus approaches its Boldest enrollment goal. At this point, there will be a demand for approximately 5,700 ASF of additional space.



(Top) Students enjoy The Nest social space.
(Below) UMR's Multicultural center.

Dining: Dining spaces include all UMR operated food service locations, from dining halls to quick service and snack bars. There is currently adequate dining facility space for the population on campus. As the campus grows, demand will increase by approximately 3,500 ASF at the Bolder goal, and then by approximately 6,500 ASF at the Boldest goal. UMR anticipates that additional dining capacity will be needed as enrollment exceeds 1,500.

Assembly: There is currently a deficit in assembly space on campus, compared to national guidelines. Existing UMR-controlled assembly spaces are limited to the multi-purpose classrooms on the fourth floor of University Square which have limited capacities of 40-100 people, and are typically used for monthly faculty-staff meetings; the planning team hosted partner engagement open house meetings in these spaces. Other assemblies occur in spaces UMR rents from partners, primarily the



Collaborative, open study spaces in 318 Commons.

City. The Chateau Theater - adjacent to University Square, and owned by the City of Rochester and operated by Threshold Arts - is used for events such as the annual Chancellor's State of the Campus address, Student Orientation, and major student events; in the City-owned Mayo Civic Center Auditorium, UMR rents space to hold larger events such as Commencement where many extended families attend to celebrate UMR's first-generation college students.

Housing

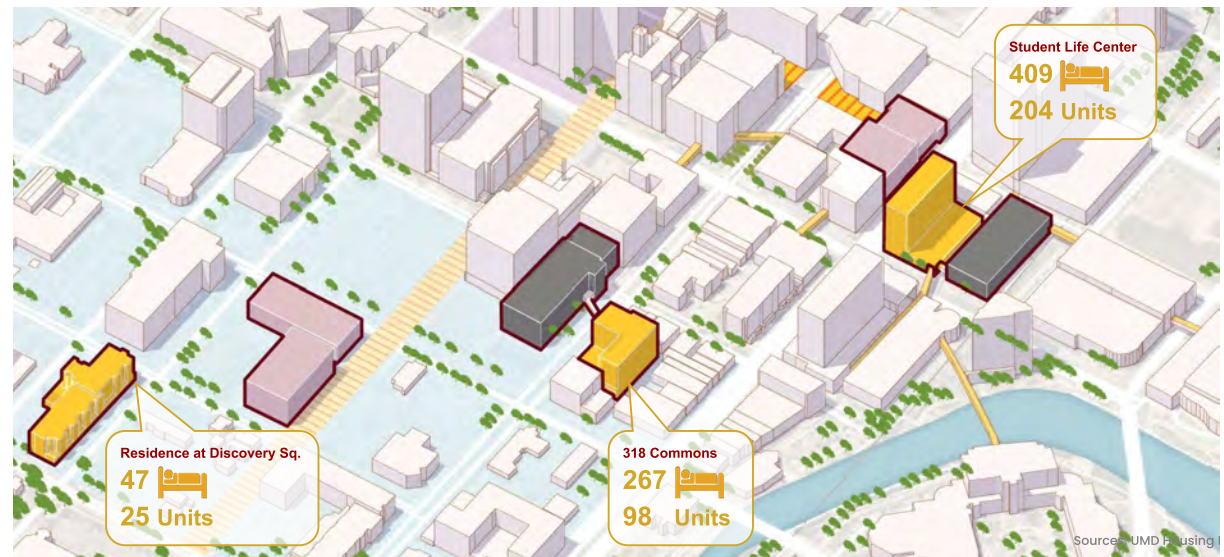
Currently, UMR has more supply than demand for housing, an intentional plan to make enrollment growth possible by remodeling the Doubletree Hotel into the Student Life Center. UMR will reach capacity for housing at the Bolder goal of 1,500 students served on campus. At this threshold, UMR may need 5-10 new beds (or approximately 1,200 ASF - to continue to grow beyond enrollment of 1,500 students served, additional student housing will be needed). This assumes current practices will continue, requiring 90% of first- and second-year students to live in UMR housing, with evidence-based expectation for increased student retention and for exceptions due to cultural practices or other reasons. This further assumes that all current non-UMR subtenants will vacate UMR housing to allow for use by UMR students. At the Boldest goal of 2,500 students, the projected demand for student housing is approximately 600 new beds (or approximately 110,600 ASF), using the same assumptions as above.

Additional Spaces

Additional space types unique to UMR's vision and program are addressed in this section.

- Health and Wellness: UMR partners with Olmsted Medical Center to provide student health services in an OMC clinic located in the public skyway level of the Student Life Center.
- Recreation: UMR has several indoor recreation opportunities at the Student Life Center: a multipurpose fitness room, a swimming pool and hot tub. UMR has no gymnasium for its growing intramural program, and no specific outdoor recreation facilities. Recreation facilities were commonly expressed as a need by students, faculty, and staff.

UMR Housing

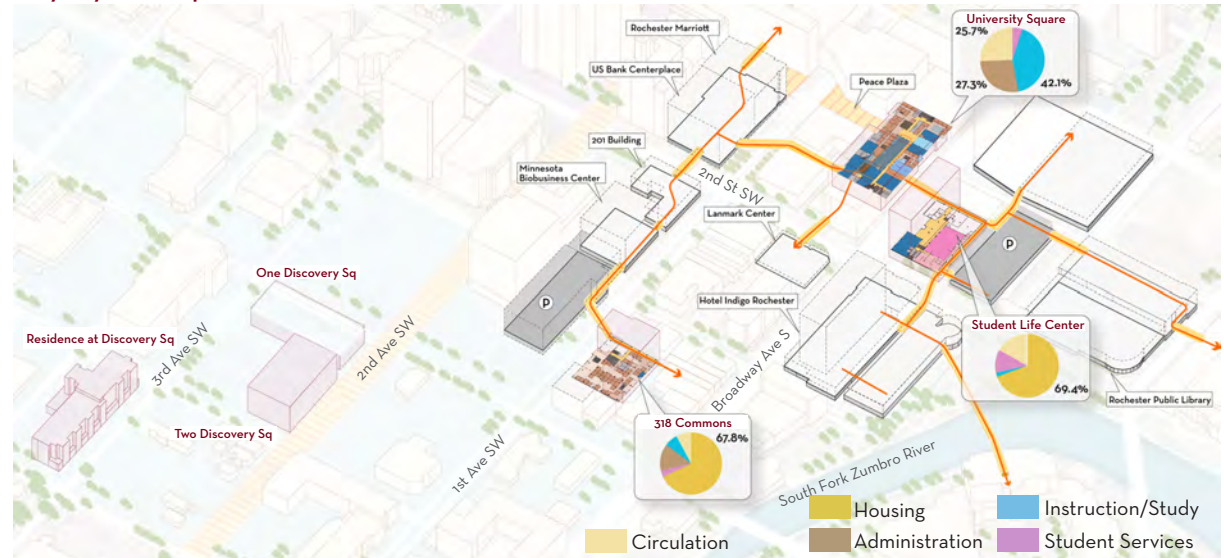


Mobility and Connectivity

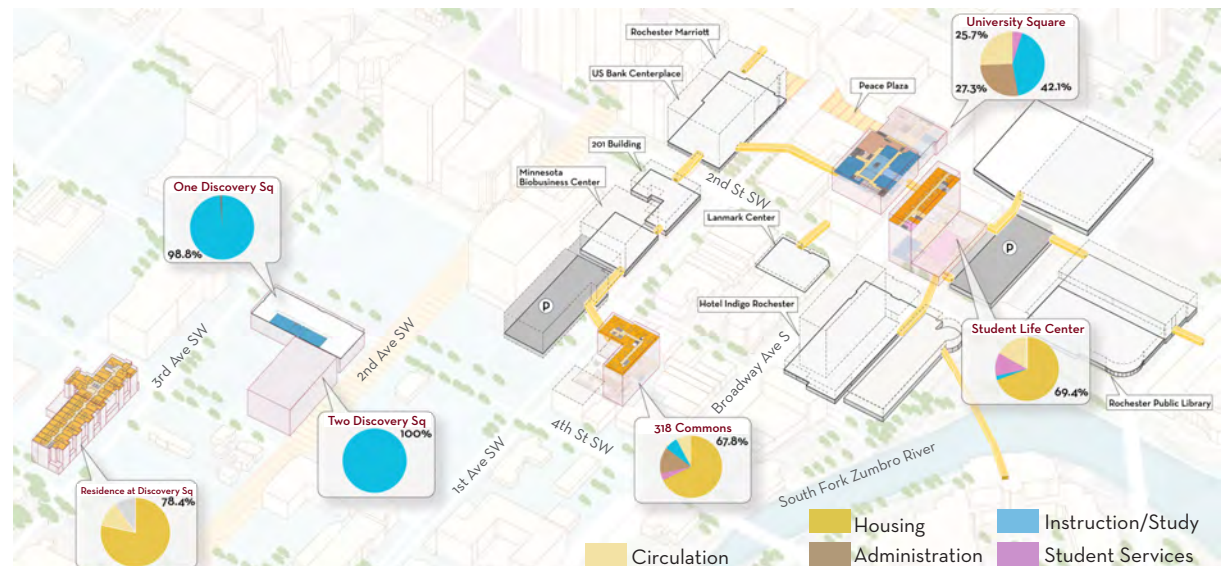
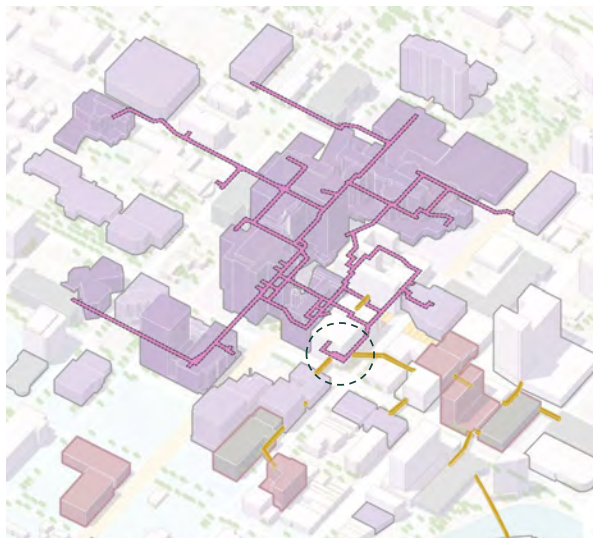
Skyways and Subways

Early data from the MyCampus engagement tool showed the value of the skyway network to the UMR community. People may walk a slightly longer distance to get where they are going, but they do so out of comfort (weather) and convenience (avoiding stairs/doors/street). People also indicated that it was common to bump into community members in the skyways and subways—including those who work at Mayo—and those serendipitous connections have value. While these spaces are not owned or operated by UMR, data from the campus community suggests that occupying spaces along their routes has value.

Skyway Level Space Allocation



Subway and Skyway Connectivity



Pedestrian and Bike Improvements

Several projects are in progress or envisioned to improve the pedestrian and bicyclist experience in proximity to UMR. Discovery Walk is a linear parkway along 2nd Avenue SW that connects the Heart of the City through Discovery Square to Soldiers Memorial Field Park and the Education District. The improved public realm will enhance pedestrian access between current UMR locations. Additional bicycle and pedestrian pathway improvements are planned along the Zumbro riverfront in alignment with the Riverfront Small Area Plan across the future 6th street bridge. Bicyclists can also navigate between the Heart of the City, Discovery Square, and the Education District along several existing dedicated bike lanes with north-south and east-west orientations.

Transit and Shared Micromobility

The City of Rochester is served by Rochester Public Transit (RPT) with many existing bus routes, including from park and ride lots, converging in the downtown area as a hub. RPT has upgraded several buses to electric engines and has plans to continue electrification for the fleet¹³. As noted previously, the future Link Bus Rapid Transit (LinkBRT) will connect downtown Rochester, Mayo Clinic's downtown campus, Mayo Clinic's Saint Mary's campus, University of Minnesota Rochester, and the future Downtown Waterfront Southeast neighborhood at the western terminus. The City has partnered with a micromobility service to provide rentable bikes and scooters, which launched in 2020¹⁴.

¹³ 2023 RPT Annual Report. <https://www.rochestermn.gov/government/departments/rochester-public-transit/about-rpt/quick-facts-reports>

¹⁴ <https://www.rochestermn.gov/Home/Components/News/News/7792/>

Commuter Travel

Data from the MyCampus engagement tool shows students, staff, and faculty commute in different ways to campus. Most students live in UMR or private housing in the downtown area meaning they commute to class on foot. Of students who live outside downtown, the majority drive solo and a smaller percentage of students use transit. However, carpooling is preferred by students when leaving downtown for necessities or entertainment. The majority of staff drive solo to work, but 25% walk, bike, or carpool. On any given day, approximately 20% of staff work from home. Faculty primarily drive to campus but over 40% of faculty walk, bike, carpool, or take transit. Faculty work remotely approximately 20% of the time.





Planning Principles 4

Planning Principles

The UMR Campus Plan is guided by four principles identified during the consultation process with the campus community. The principles provided direction in the design and decision making process. Each of the principles is summarized and explained in this section.



Flexibility & Adaptability

Physical Space: Flexible spaces are important for a variety of learning and collaboration needs. Faculty and students need to be able to configure classroom and collaboration spaces for a variety of teaching and learning styles as well as informal activities. This requires adequate space and moveable furniture and technology.

Decision-Making: Recommendations are needed that facilitate UMR growth in the near-term and support UMR stability in the long-term. UMR will need flexibility in terms of space use as enrollment increases.



Proximity & Connection

Proximity within UMR and the Rochester community fosters relationship-building and serendipitous connections. These moments directly contribute to student and community success. It is important that UMR facilities are within a 10 minute walk of one another and, where possible, connected via the skyway and subway network. Currently, all UMR facilities except those in Discovery Square are connected via this network.



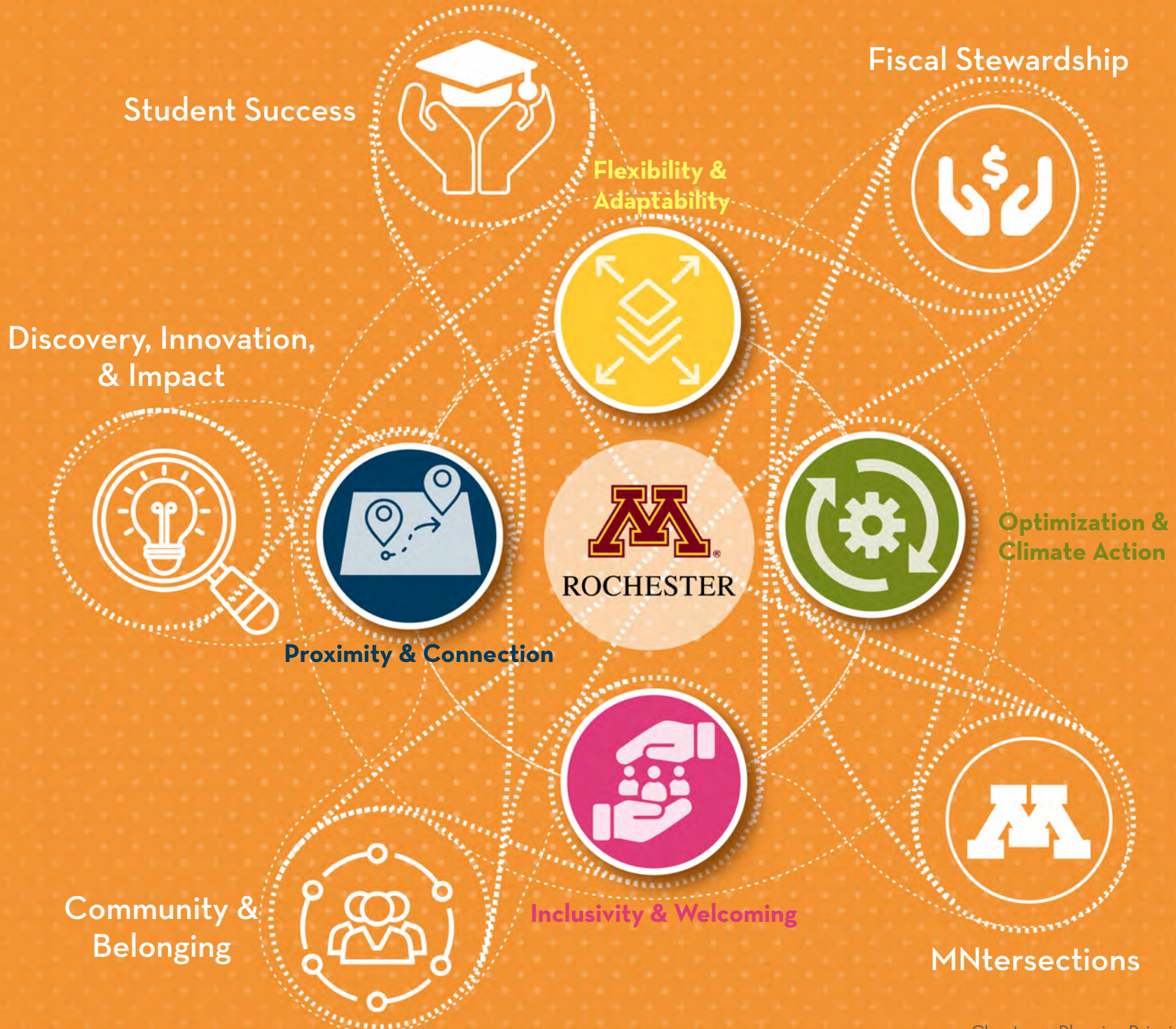
Inclusivity & Welcoming

Continue supporting, and look to better support, the needs of all in academic, housing, and student life spaces. UMR is a diverse community of learners coming from a variety of backgrounds and many are first time college students in their families. Many come from rural areas and experience their first urban environment in Rochester. In response, great care is needed to ensure that welcoming, inclusive spaces are provided for the student body in academic, social and housing environments. UMR must also be responsive to safety concerns and foster a culture of safety.



Optimization & Climate Action

Physical assets will be optimized to support all UMR and system-wide goals, including: student learning, campus culture, healthy buildings, climate action, and fiscal stewardship. Given that UMR is located in leased space, efficiency and emissions are key considerations.





SHOPS

University Square



Revealing the DNA of Learning

CHESTER'S
kitchen & bar



Planning Vision: Big Ideas

5

Big Ideas

The Campus Plan provides a flexible approach for accommodating UMR's activities in both leased facilities and potential purpose-built facilities over the next 10 years and beyond. It recommends the development of design guidelines to inform future renovations of future leased space and provides guidance for Smart Leasing to ensure that UMR is able to meet the systemwide goal for carbon neutrality. It also provides direction for future facilities that may be constructed in the Education District.

The plan for UMR is based on 9 Big Ideas that emerged from the assessment and consultation process with the campus community. These ideas are the basis for the key recommendations of the plan and are considered relative to near-term (0-10 years) and long-term implementation (10-30 years). The Big Ideas represent actions that should shape the near- and long-term future of the UMR campus, and were developed in response to drivers and principles articulated in the Campus and Climate Action Plans.

The Climate Action Plan should be utilized as a companion document to this Campus Plan.



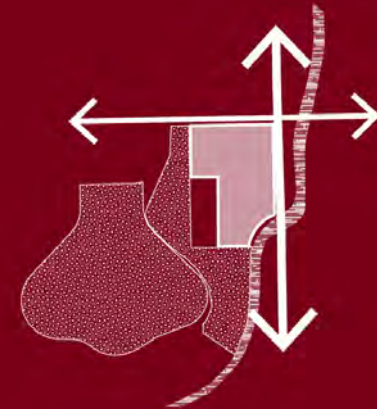
Big Idea 1.
Create functional, healthy, and accessible UMR spaces.



Big Idea 3.
Plan for new UMR specialty spaces.



Big Idea 2.
Develop a smart lease approach to reach campus and climate action goals.



Big Idea 4.
Develop in the Education District to support enrollment growth.

Labels in this section

- NEAR** Big ideas with near-term implementation
- LONG** Big ideas with long-term implementation
- PRIORITY** Priority big ideas
- CLIMATE ACTION** Climate action-related big ideas



Big Idea 5.

Work with partners to create additional specialty spaces.



Big Idea 6.

Work with the City of Rochester and DMC on GHG emissions reduction goals and climate resilience—because UMR climate action success relies on collaboration.



Big Idea 7.

Reduce emissions from vehicular transportation, and make sustainable commuting the easy choice.



Big Idea 8.

Continue to expand integration of climate action, climate resilience, and sustainability into UMR curriculum and co-curricular activities.



Big Idea 9.

Advance climate and community resilience priorities on campus.



Big Idea 1: Create functional, healthy, and accessible UMR spaces.

UMR is a unique campus that has evolved with and from the community of Rochester. In order to support innovative learning environments while continuing to grow, the University should look into creative ways to make existing spaces work better to support campus and climate action goals.

While the near-term is defined as the next ten years, there are several priority actions that can support efficient space use in the very near-term.

PRIORITY

1.1 Right-size classroom spaces to reflect current needs and innovative learning strategies.

As enrollment grows, UMR classrooms will be planned and scheduled to meet the desired section size derived from known pedagogical success and faculty capacity. This will require dynamic management to reach an equilibrium between the cost and space requirements associated with a high count of available learning spaces which supports flexibility, and the number of students registered in each section, which can affect efficiency in terms of use of facility resources. This will require further study as enrollment increases.

PRIORITY

1.2 Continue to ensure scheduling strategies support achieving utilization targets.

Opportunities may be identified to increase utilization targets for existing classrooms and labs in support of the UMR mission, depending on the physical configuration of each learning space in the inventory. For example, matching small sections to small rooms in order to reserve larger rooms for larger sections maximizes occupancy and limits shortages during peak demand. As growth creates some strain in the short term, it may be necessary to change scheduling of some spaces to improve use of the resources.

PRIORITY

1.3 Identify and update classroom and academic spaces that do not have the right amenities.

UMR will continue to seek opportunities to update technology and furniture to ensure that classroom and academic spaces are as flexible as possible to meet evolving needs. For example, recent renovations at Two Discovery Square offer state-of-the-art instructional labs, yet all classrooms in University Square are in need of renovation.

NEAR

1.4 Continue to use UMN building standards and interior design guidelines to create spaces that work better for all users.

As demonstrated by UMR's recent renovations to 318 Commons and Two Discovery Square, the goal is to create spaces that inform future renovations and new spaces in a manner responsive to student success, health, well-being and sustainability goals. Priorities identified during the planning process include:

1. Daylighting and room-layout standards
2. Energy efficiency standards
3. Sustainable and healthy materials standards (e.g. reference the WELL standard)
4. Amenity preferences for classrooms, lounges, and housing
5. Interior signage and branding standards (including in the skyways and subways)

NEAR

1.5 Consider investing in tenant improvements where spaces do not meet minimum design guidelines.

Invest in tenant improvements where leased spaces do not align with the design guidelines. This would be done to ensure that existing spaces that UMR would like to occupy for an extended period of time support learning and student engagement objectives.

NEAR

1.6 Make use of exterior design guidelines to improve wayfinding and accessibility around campus.

The distributed nature of UMR facilities requires clarity around wayfinding and accessibility to ensure that students, staff and faculty can easily navigate their daily routines. Signage and digital wayfinding play key roles. It will be important that the design guidelines are aligned with the Culture of Safety being fostered at UMR. Key factors to consider for exterior design guidelines include:

- Exterior signage and block-M standards
- Compliance with Culture of Safety
- Accessible entrance standards
- Digital wayfinding



UMR's Culture of Safety Plan seeks to establish a welcoming and inclusive campus that promotes a culture of safety where all are welcome and feel welcomed to express themselves by:

1. Effectively using and strategic placing of safety infrastructure;
2. Effectively planning and preparing for a variety of incident responses using a solid and tested platform from which to build;
3. Providing educational opportunities and promoting resources, good practice, and awareness of the campus environment; and
4. Leveraging community relationships and partners who share.

Concept Study: University Square

The conceptual diagram of University Square to the right illustrates how key principles and priorities might play out in the redesign of this space - however, the same principles and priorities could be applied to other locations.

Democratize the light

- A new window aligns with the arch form present in the brickwork of the Broadway facade of the building to bring natural light into student-centered spaces. (See #5)
- Window walls allow interior spaces to “borrow” light from the atrium and other areas. (See #3)

Create a Heart of the Campus

- The atrium area is reimagined as a bustling informal social space close to essential academic and support spaces that will function as the Heart of the Campus (see Big Idea 3 for more on Heart of the Campus). This space is viewed as the UMR “living room” featuring views of Peace Plaza and the Mayo Gonda Building to the west and views toward the Mayo Civic Center to the east. A library and informal study space is proposed on the east side facing Broadway. (See # and #2)

Flexible spaces and support spaces that build community

- Interior classrooms with modular walls enable classes of different sizes to utilize the spaces. (See #4)
- The student/faculty engagement zone is modeled on the JustASK space at 318 Commons which also features access to natural light and flexible study environments. Faculty offices surround this space and could include window walls to “borrow” light and to provide visual connectivity. (See #5)



University Square: Third Floor Conceptual Diagram

Climate Action Opportunities at USQ

- Explore options for energy efficiency and connection to the future Thermal Energy Network.
- Specify sustainable materials.
- Add HVLS (high-volume low-speed) fan in the atrium.
- Specify high performance windows (e.g. triple-glazed) with glare protection.
- Integrate occupancy sensors into the building.
- Install building automation controls with set points for thermal comfort and efficiency, smart receptacle controls, and air circulation.
- Specify a lighting power density of 0.5 watts per square foot.
- Specify Energy Star appliances.
- Plan for low waste in the cafe and 3-stream waste: trash, recycle, compost.



1 Well-lit study spaces



2 Well-lit "living room"



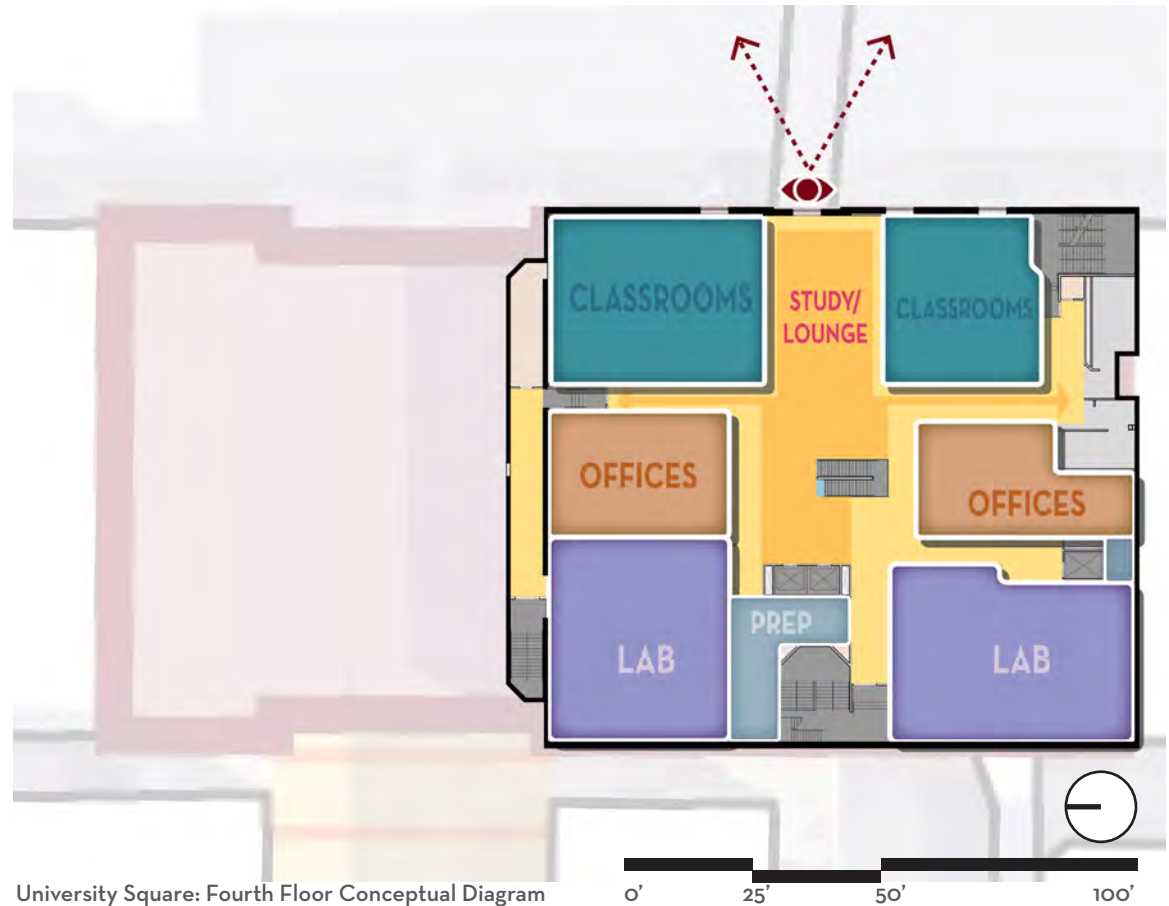
3 Modular walls for flexible classrooms



4 Transparent walls for interior classrooms



5 Potential new window



University Square: Fourth Floor Conceptual Diagram

The fourth floor of University Square offers similar opportunities for reorganization as those on the third floor. Natural light is introduced via the new window over the skywalk and utilized as a key feature in a central lounge and study environment. Classrooms with window walls are located on either side of this lounge and study space. Offices are positioned at the center of the concept diagram and feature transparent walls to "borrow" light from the central space. Labs are located to the rear of the building where there are no windows.

On the second floor where the skyway connects University Square with the Student Life Center, there is a similar opportunity to improve the experience of arriving at UMR via the elevator lobby and staircase. Signage, lighting and a general sense of openness would create a welcoming environment.

As noted, the diagrams are intended to demonstrate the potential for renovation based on emerging principles. Future architectural programming and design studies are needed to develop floor plans aligned with UMR's specific needs.



Big Idea 2: Develop a “smart lease approach” to reach campus and climate action goals.

The smart lease approach serves as a decision-making tool to support the University in leasing and space migration decisions. The smart leasing approach asks UMR to consider four key principles when reviewing location criteria: design guidelines, enrollment goals, climate action, and location. The goal is to deliver on the qualitative goals for space set out by UMR and to ensure that future leases are responsive to the UMR climate action goals. The smart lease approach is inclusive of climate action-specific tools, such as green leasing; green leasing is one implementation tool to consider when making decisions about spaces. The smart lease approach will guide both long-term and near-term lease arrangements at UMR.

Criteria for selecting future spaces using the smart lease approach includes the following:

NEAR LONG CLIMATE ACTION

2.1 Prioritize new spaces that meet minimum design guidelines.

Design guidelines should advance the Planning Drivers and Principles of the Campus Plan. For example, spaces should be prioritized that can support active learning, are energy efficient, and promote health and well-being. The University utilizes the B3 Guidelines and the SB2030 Standard as an external certification to ensure building performance standards are met. The University will work with landlords to ensure leased spaces meet and document agreed-upon standards. In congruence with the Climate Action Plan, green lease agreements will be explored to eliminate energy-related emissions. In addition to meeting B3 Guidelines and SB2030, additional standards that align with UMR’s health focus, such as the WELL Building Standards, could also be applied. Lastly, design guidelines should consider the future impact of climate change and resiliency.

NEAR LONG CLIMATE ACTION

2.2 Prioritize spaces along the existing or future skyway network and future TEN.

Through engagement with the Advisory Committee, students, faculty, and staff, internal connections among UMR leased locations emerged as a key concern for the campus community. Where possible, future leased space should be located on Rochester’s skyway and subway network to optimize convenience, comfort and safety.

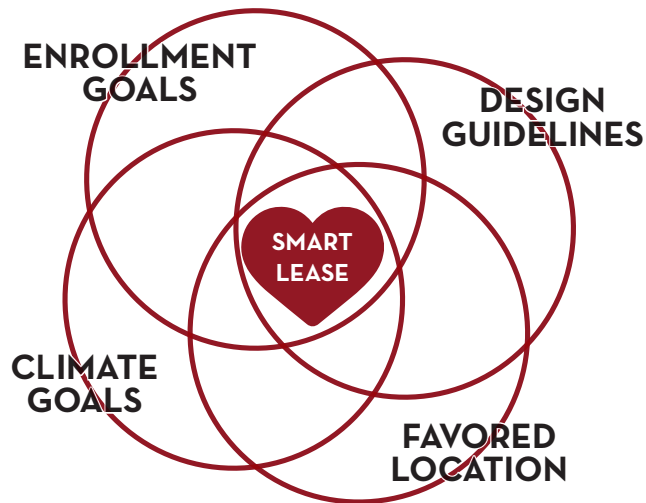
DMC has a strong potential role to encourage lessors to offer UMR skyway/subway-connected space, and to participate in planning and funding as property owners and the City consider extending key segments. Based on engagement with the UMR community and external partners, priority extensions that would be consistent with the City’s Downtown Plan include a potential subway connecting the Guggenheim Building to One Discovery Square, and a skyway or subway across Broadway between 3rd and 4th Streets.

Location is also an important consideration when pursuing the campus decarbonization goals. Buildings within proximity to the City’s future TEN have a greater potential for connection to the network and the likelihood of eliminating the use of natural gas.

2.3 When entering a new lease (in existing or new spaces) negotiate green leases.

Green leases will be critical if UMR is to deliver on climate neutrality. UMR will continue to lease space in the Heart of the City and will need to work with landlords to ensure they understand the importance of providing high-performance buildings. Key considerations for future lease arrangements include

- Set performance-based targets for energy efficiency and carbon reduction.
- Co-develop pathways to decarbonization with lessors, including connecting to the City’s future Thermal Energy Network.
- Include clauses that detail ongoing collaboration, such as energy audit, retrocommissioning, and submetering, and utility data sharing.



What’s in a name? New terms for new approaches.

Green lease (also called a high-performance lease, or energy-efficient lease) is a lease agreement in which tenants and landlords commit to and work together to achieve energy efficiency, energy use, and other sustainability targets. More information on green leasing is available through the Green Building Alliance at www.gba.org.

Smart lease (or the smart leasing approach) refers to a decision making process that enables the University to vet locations based on a matrix of principles and priorities.

2.4 For new construction lease opportunities: negotiate for the B3 Standard.

UMR will work with landlords to meet the B3 Guidelines and SB 2030 Energy Standard, which provide criteria for high-performance buildings. UMN requires this for any new builds owned by the University and this standard can be applied to the private sector. UMR would prioritize buildings that can meet and document the final SB 2030 of net zero carbon.

2.5 Anticipate new classroom and office space as enrollment approaches the Bolder goal of 1,500.

UMR will need to monitor enrollment and space use to inform investments in facilities (new leases, renovations, new construction) to meet anticipated demand. UMR will need to identify expansion opportunities that deliver on the Smart Lease criteria.

NEAR LONG

2.6 Anticipate new housing as enrollment grows to the Bolder goal of 1,500.

UMR currently has sufficient capacity in its leased housing facilities to support a population of up to 1,500. At this threshold, UMR may need 5-10 new beds (or approximately 1,200 ASF). As enrollment exceeds 1,500, UMR projects a need for additional dining capacity. Likely strategies include activating the kitchen in 318 Commons for residents and commuter students to provide grab-and-go food service as well as limited seating in the Nest. As enrollment approaches 2,500 students, approximately 600 new beds (or approximately 110,600 ASF) will be needed. New housing opportunities will need to be identified that are responsive to the Smart Lease criteria.

PRIORITY

2.7 Plan for a new JustAsk / academic “House.”

UMR’s model for faculty-student academic support space uses the “house” model: communities organized in response to social, engagement and learning objectives. 318 Commons serves as a precedent for the house model. It features UMR’s concept of the JustASK student-faculty interaction space on the second floor. JustASK spaces bring faculty and success coach offices together with student study and support spaces.

A well-functioning Academic House (JustAsk) space includes a variety of functions and features:

An Academic House is:
Focused
Bright
Flexible
Collaborative
Accessible
Friendly/Relaxed



Feedback from faculty, staff, and students helped identify important functions and features of a successful JustAsk space.



Big Idea 3: Plan for new UMR specialty spaces.

There are several desirable specialty spaces not currently provided by UMR or others and that could be provided in the near-term and long-term. These spaces would enhance the mission of UMR. The specialty spaces identified in Big Idea 3 could be developed by UMR over the next 10 years and beyond through collaboration with key partners.

PRIORITY NEAR LONG

3.1 Heart of the Campus

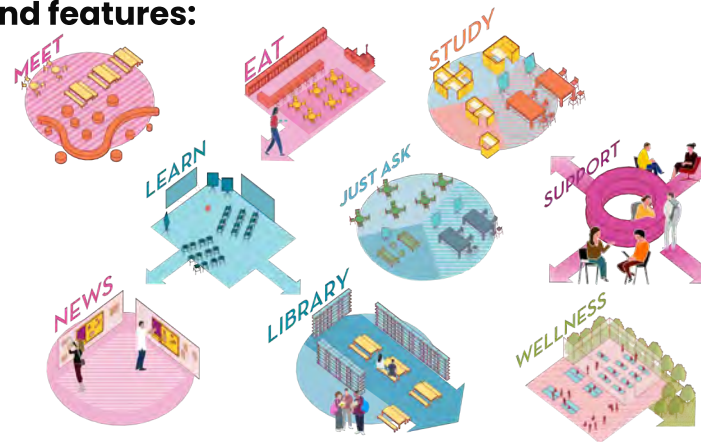
The planning process revealed a desire for a “Heart of Campus”, a central space for informal gathering and engagement. Envisioned as a campus living room, the Heart of the Campus would provide a place for the campus community to meet informally in a vibrant engaging space. Amenities would include soft furnishings, alcoves for conversation, and access to a small cafe.

Early engagement in the planning process revealed that most people found it hard to say exactly where the Heart of the Campus was currently, where others stated that it doesn't exist. Several respondents indicated that University Square or 318 Commons are the closest definition of a Heart of the Campus. With more engagement with the Advisory Committee, students, faculty, and staff during the planning process, the following qualities, features, and functions of a Heart of the Campus were identified: the space should be distinctly UMR, bustling, welcoming, social, connected, open, and focused.

A clear “Heart of the Campus” space includes a variety of functions and features:

The “Heart of the Campus” is:

Distinctly UMR
Bustling
Welcoming
Social
Connected
Open
Quality
Focused



Feedback from faculty, staff, and students helped identify important functions and features of a successful “Heart of Campus” space.

NEAR

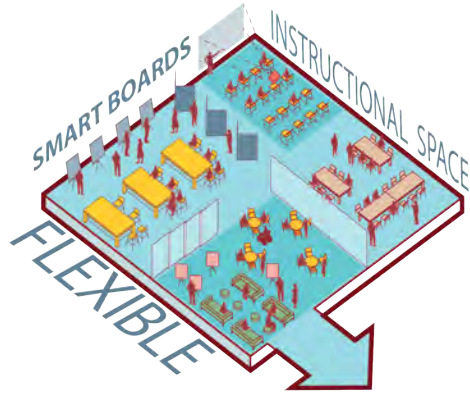
3.2 Instructional Development Center

The instructional development center would provide a place for “educating the educators”, a professional development center for educators from partner institutions such as the Hormel Institute, Mayo Clinic Education Shield, and Rochester Public Schools and other state K-12 science instructors. It would include:

- Conference/meeting space, flexible for various group sizes, functional adjacency to leverage UMR’s envisioned Center for Learning Innovation and its research-based pedagogy.

3.3 Internship and Career Center

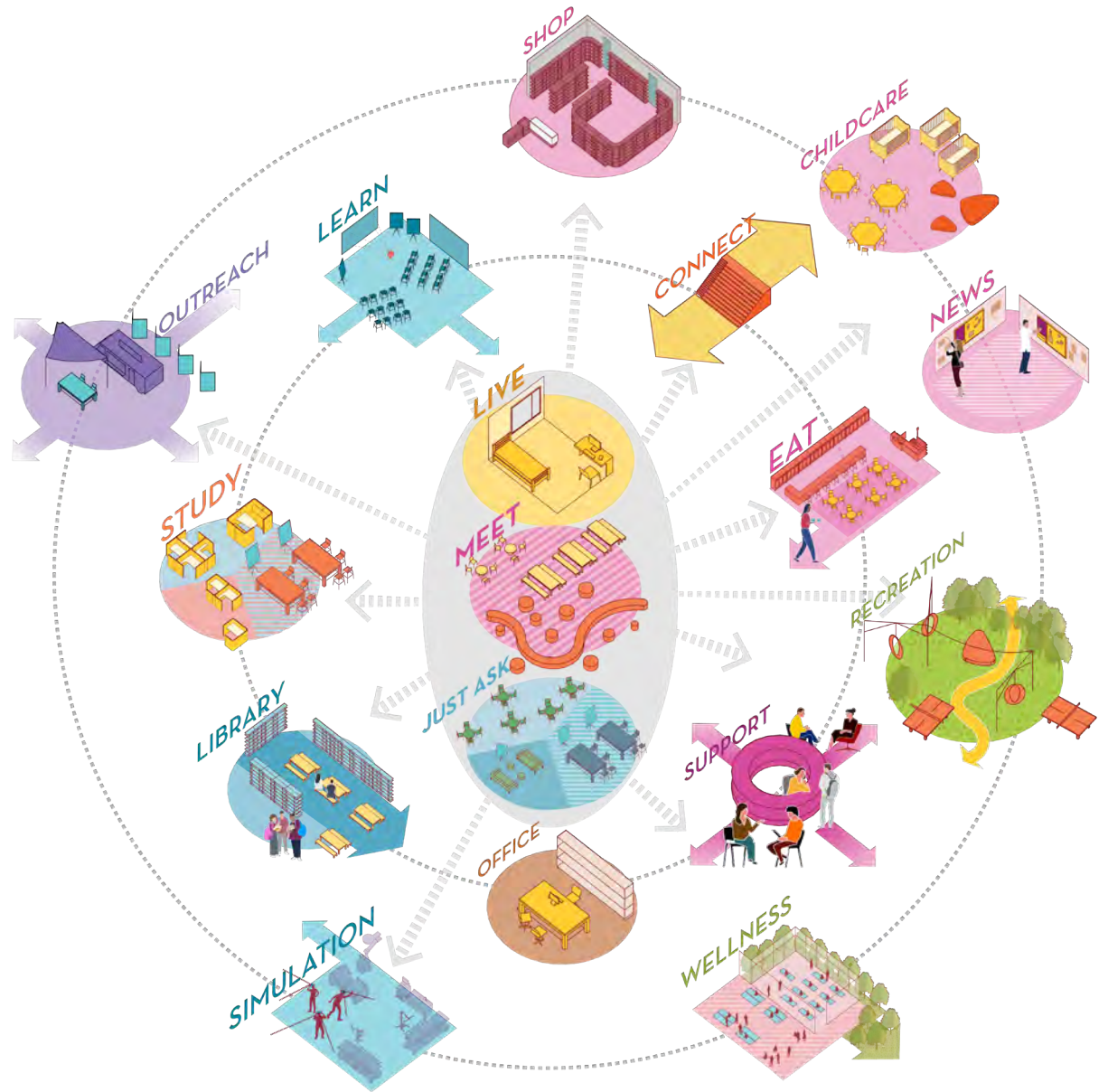
The Internship and Career Center would provide resources and opportunities for UMR students as prospective interns, linking them to potential internship providers such as Mayo Clinic, Hormel Institute, biotech tenants in Discovery Square, and many others. The Center should be incorporated in or adjacent to Heart of the Campus spaces.



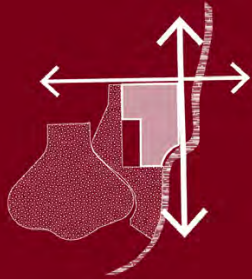
Instructional Development Center



Internship & Career Center



A clear Heart of Campus space includes a variety of functions and features.



Big Idea 4: Develop in the Education District to support enrollment growth.

UMR's current location in downtown Rochester in close proximity to the Mayo Clinic and other partners contributes to mission success. The Education District provides additional opportunities to support UMR's needs and other purposes as enrollment increases to 2,500. As UMR develops in the Education District, leased facilities will be maintained downtown. The following provides an overview of potential actions.

LONG

4.1 Develop in the Education District as enrollment approaches the Boldest goal of 2,500 students served on campus.

As enrollment approaches 2,500, additional housing will be required to accommodate first and second year student demand. Academic spaces unique to the UMR model – such as an academic house where students, faculty, and student success coaching staff co-locate, similar to existing UMR spaces – could expand to the Education District. Amenities to support campus life, from social spaces to recreation, are expected as well. This would provide the opportunity to deliver a new zero emissions building. The project could be delivered by the University or in partnership with others. Scoping should begin several years before enrollment grows beyond UMR housing capacity.

Based on engagement with the Advisory Committee, students, faculty, and staff, housing in the Education District could be well suited to upper-year student cohorts. Many students indicated they would generally welcome housing opportunities more independent from daily academic activities on campus than the Student Life Center which is intended to support first- and second-year students. Student housing in the District would be located within walking distance of existing UMR buildings, City parks, grocery shopping, downtown amenities, and the City's planned Downtown Waterfront Southeast redevelopment area across the Zumbro River.

LONG CLIMATE ACTION

4.2 Design resilient, zero emissions buildings.

New construction and major renovations provide the best opportunity for delivering on UMR's climate action goals. New buildings and major

renovations are required to be constructed to the B3 Guidelines and SB 2030 Standard, and should be specified to a design flood elevation above the 500-year flood line. The outcome of this will be:

- zero emissions building(s), accelerating SB 2030 standards to the 2030 requirements, if applicable
- integrated solar PV or other renewables
- potential connections to the City's future TEN
- buildings designed for 500-year flood events

NEAR LONG

4.3 Extend parks and trails to connect the City's existing network.

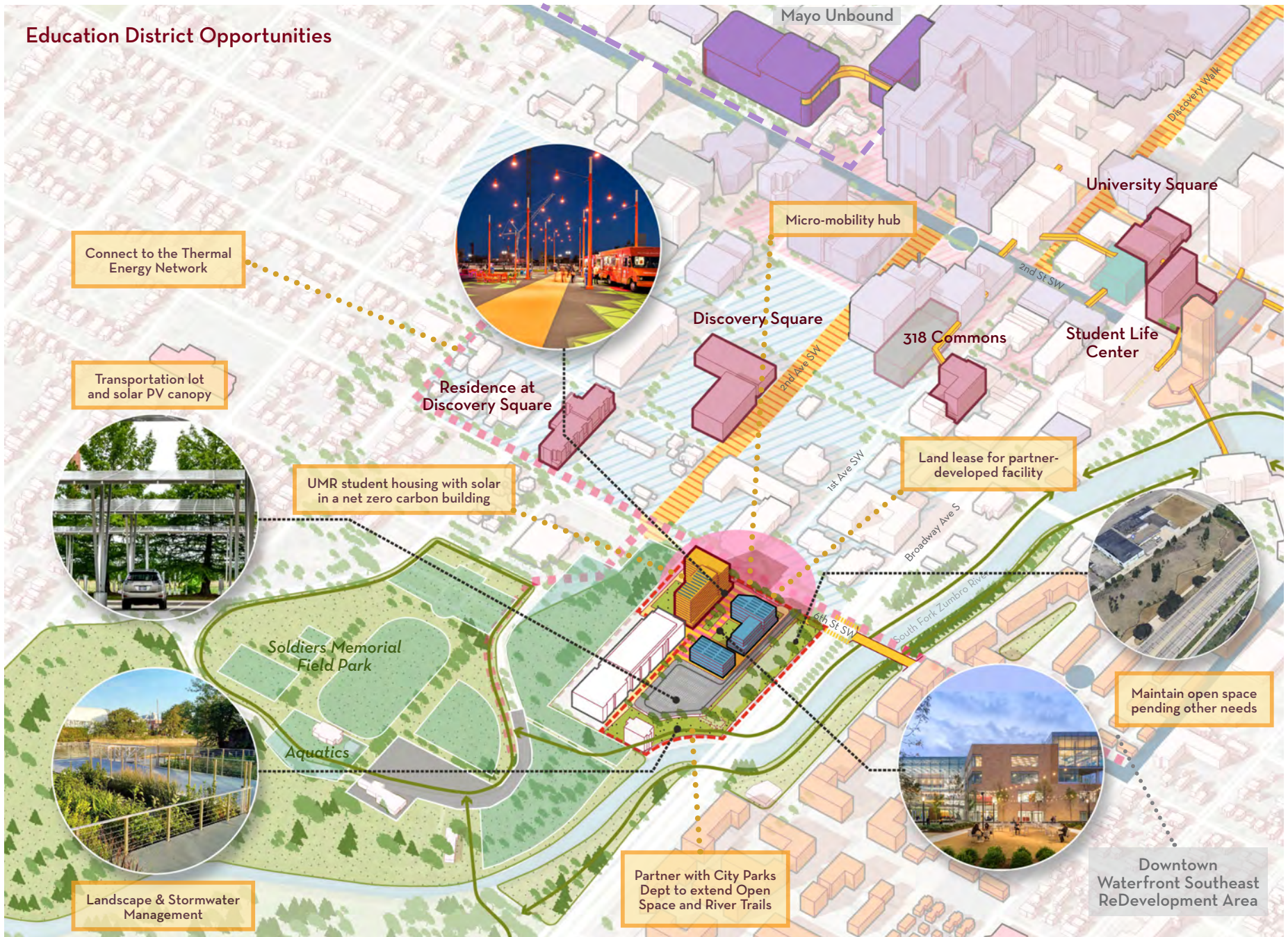
The City has an existing riverfront walk that does not cross Broadway Ave South, but picks up separately on the west side of the same street. Whether an extension of this trail continues across Broadway Ave South, or at the future 6th Street bridge, the Education District land can provide connectivity between the river walk and Soldiers Field Memorial Park.

NEAR LONG

4.4 Create low-maintenance and accessible outdoor recreation space.

In the Education District, UMR is already maintaining native grasses and trees on top of the capped former industrial site. Future parks and recreation spaces will need to be designed to thrive within this context. In the near-term, the use of low maintenance plant communities should continue. Additional temporary activations might include outdoor sports pop-ups, or other temporary uses.

Education District Opportunities





Downtown Partners.

- | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| Mayo - Patient Care | Olmstead Medical | Schools - Existing |
| Mayo - Non Patient Care | Cultural Amenities | UMR - Leased Buildings |
| Destination Medical Center (DMC) | Developers | |



Big Idea 5: Work with partners to create additional specialty spaces.

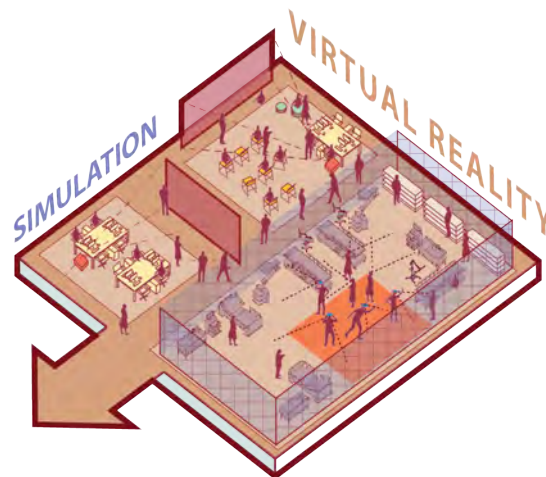
There are several exciting opportunities for partnerships that can support desirable space types not currently accounted for in UMR facilities.

PRIORITY

5.1 Immersion Learning Lab

A virtual reality/augmented reality simulation center focused on emerging technologies in the health sector would be beneficial to UMR, the University of Minnesota School of Nursing, Mayo Clinic School of Health Sciences, and other higher ed partners. It would assist all partners in advancing the way in which they educate students for the next generation of health care technologies. This is a near-term opportunity.

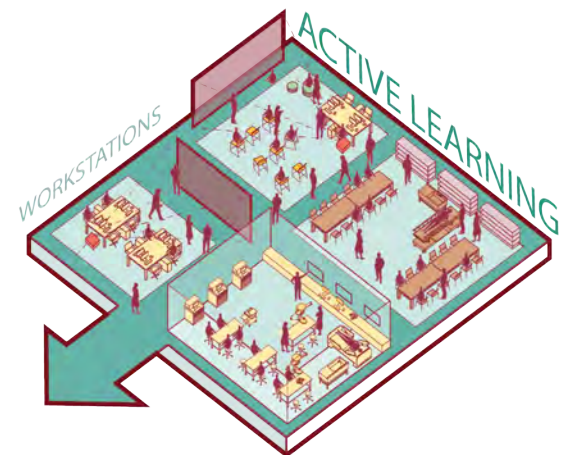
Opportunities also exist for UMR to collaborate with Mayo and others with regard to Artificial Intelligence (AI) and other emerging technologies relative to healthcare, education, and facilities given UMR's faculty research focus on student learning.



NEAR

5.2 Active Learning Opportunities at Mayo

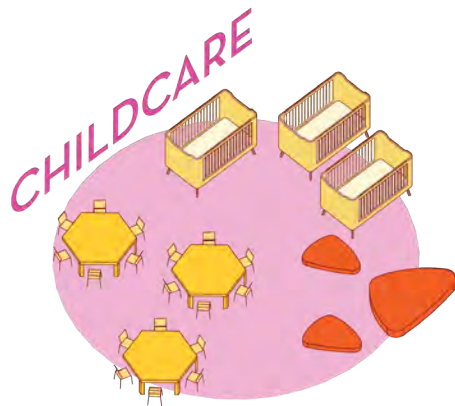
Active learning opportunities utilizing existing or potentially new spaces at Mayo would expose UMR students and others to the opportunities offered in a world-class clinical care and research setting.



NEAR

5.3 Childcare

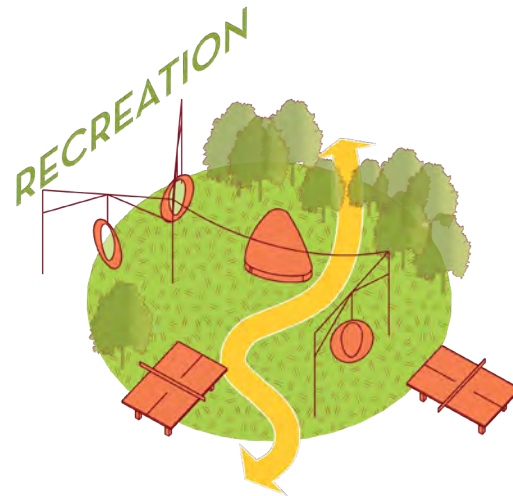
Childcare services emerged as a need with the UMR community and are understood to be a need for other institutions and potential partners in downtown Rochester. Access to childcare services would be beneficial for faculty, staff and students, and is often cited as a major recruitment consideration for Mayo Clinic, and other employers in downtown Rochester. Partnerships with DMC and others may provide opportunities for providing childcare.



NEAR LONG

5.4 Outdoor Recreation

Students identified the desire for outdoor recreational opportunities. The City of Rochester is developing a project to create a regional outdoor sports complex at a site to be determined. UMR will continue to pursue partnership with the City to make such facilities available to students, faculty and staff. Soldiers Memorial Field Park south of downtown provides some opportunities and could be better linked with UMR facilities and the Education District by extending the trails of the park through the Education District to connect with the City's existing network.



PRIORITY

5.5 Indoor Recreation

UMR students indicated a need for indoor recreation in Rochester. The closure of the YMCA adjacent to Soldiers Field Memorial Park leaves a major gap in recreational opportunities, including a gymnasium in downtown Rochester. Given the number of institutions, residents and visitors downtown, UMR will continue to explore partnerships to provide indoor recreational opportunities.





Big Idea 6: Work with the City of Rochester and DMC on greenhouse gas emissions reduction goals and climate resilience—because UMR climate action success relies on collaboration.

UMR’s ability to reduce GHG emissions and build community resilience will depend on partnership with and action by others, especially the City, DMC, Rochester Public Utility (RPU), and lessors. Partners are well-equipped to support these goals because they share similar GHG emissions reduction targets and climate action goals. UMR plays a critical role in supporting this work through application of University expertise, engaging the UMR community, advocacy, and being a proactive tenant.

NEAR LONG CLIMATE ACTION

6.1 Support local decarbonization initiatives.

RPU’s transition to carbon free electricity is a determining factor in UMR’s ability to transition away from fossil fuels. Once RPU meets its carbon reduction commitment, electric heating and cooling systems in buildings will be carbon neutral. The City’s future TEN will further support efficient heating and cooling in buildings. To capitalize on these investments in decarbonized infrastructure, the University will need to collaborate with current and prospective landlords to electrify buildings and promote connections to the future TEN. UMR will work with local partners to build capacity around decarbonization opportunities for developers and land owners. Any new buildings in the Education District may be able to connect to the City’s future TEN along the #3/Red loop.

Support for ongoing initiatives related to mobility and transit and climate resilience are also important components of this work and are described in more detail in Big Idea 7 and Big Idea 9, respectively.

Emissions Reduction Goals in the Community

- UMR: 100% by 2050
- City: 100% by 2050; 50% by 2030
- DMC: 80% by 2050
- Mayo: 50% by 2032
- RPU: 100% by 2030 (electric utility)

NEAR LONG CLIMATE ACTION

6.2 Support learning, programming, and thought leadership around funding opportunities for retrocommissioning, green leases, and district energy.

New forms of partnership, such as green leases and innovative financing options, will require education and programming to support a collective decarbonization transition. Tools, guides, and funding models developed by DMC and the City will support UMR’s engagement with landlords when developing green lease terms and indicating a strong preference for buildings connected to Rochester’s future TEN. Educational materials about innovative state and federal financing options available today (e.g. Inflation Reduction Act tax credits) will also advance knowledge about opportunities to stack funding options to make investments in sustainable buildings economically favorably.

DMC Partnership Opportunities

CLIMATE ACTION

Facilitate City Thermal Energy Network (TEN) rollout, green leasing, and community support for RPU's decarbonization. Develop funding models and analytical tools for decision making that incorporate:

- clear pathways to decarbonization through partnerships;
- the cost and support for equipment and building system upgrades; and
- opportunities related to the Inflation Reduction Act.

Participate in capital project funding for City distribution and renewable grid infrastructure.

Support shared sustainable mobility goals.

- Advance DMC's goal that 50% of downtown commuters will be non-vehicular.
- Continue to support the electric vehicle charging network in the downtown and in City ramps.
- Coordinate UMR opportunities with LinkBRT improvements.
- Expand implementation of micro-mobility/sharing, bike amenities, covered public parking in centralized location, etc.

FACILITY NEEDS

Facilitate multi-constituent indoor recreation facility located downtown to accommodate a variety of recreational and social activities.

Identify shared needs for childcare among downtown partners.

- Locate in the Heart of the City, or in the Education District as part of a mixed-use facility serving compatible UMR and/or partner needs.
- Explore potential curriculum and practicum tie-in with UMR and other higher-ed partners.

Encourage skyway and/or subway extensions, consistent with City plans.

- To One Discovery Square from the existing Mayo / Guggenheim subway.
- Others such as across Broadway between 3rd and 4th Streets.

Develop comprehensive wayfinding signage in Heart of the City and throughout Downtown.

Facilitate development of shared-use special-purpose learning and assessment environments.



Big Idea 7: Reduce emissions from vehicular transportation, and make sustainable commuting the easy choice.

Opportunities for reducing transportation related emissions over the next decade will focus on electrification, and changes in modal split to favor walking, biking and transit. In addition to these changes, the following strategies will be deployed to advance UMR's carbon reduction and mobility goals.

NEAR LONG CLIMATE ACTION

7.1 Transition the University Fleet to battery electric (BEV) and plug-in electric vehicles (PHEV). Review policy, procedures, and driver education materials to support electric vehicle adoption of take-home vehicles.

UMR's fleet vehicles are candidates for BEV and PHEV in the near-term given the make, model, and usage patterns. Recruiters' take-home vehicles are currently better suited for a PHEV replacement given the state of Minnesota's charging network. Take-home vehicle policies or guidance will need to be updated for at-home charging and other arrangements that support the transition. Driver education will also increase the uptake and comfortability with electric vehicles.

NEAR LONG CLIMATE ACTION

7.2 Encourage students and employees to live downtown through partnerships and off-campus housing support programing.

UMR currently provides campus housing to a small number of employees and could continue this practice over the next few years. Upon enrollment growth, this type of housing support may not be possible. Education and support on local housing options that account for sustainable transit options could be provided to students and employees.

NEAR LONG CLIMATE ACTION

7.3 Create an electric vehicle charging plan for students, employees, and the UFleet.

As vehicles transition from internal combustion engines to electric over the years ahead, UMR will need to ensure that faculty, staff, and students have access to electric charging points in leased garages and other convenient locations in downtown Rochester. UFleet will also need dedicated charging space for electric vehicles.

NEAR LONG CLIMATE ACTION

7.4 Deploy sustainable transportation initiatives and educational campaigns about alternatives.

UMR can support commuters through programs such as trip planning support, electric vehicle education and coaching, and carpool matching. Educational campaigns will be needed to inform the UMR population and others about the Link BRT, micromobility options, and other transit services that will be available for their daily needs.

NEAR LONG CLIMATE ACTION

7.5 Support City initiatives for clean transportation, such as bike lanes and electric vehicle carsharing.

UMR, through partnership with the city and others, can advocate for improved bike infrastructure and car sharing programs in the downtown area.

NEAR LONG CLIMATE ACTION

7.6 Improve mobility infrastructure and amenities on campus.

UMR will seek out infrastructure upgrades, such as creating a mobility hub in the Education District and increasing access to bike amenities (i.e. racks/parking, showers).

2034 Commuter Emissions Target

By 2034, over 50% of employees and over 60% of students will commute by a mode other than car (bike, transit, walking).

2034 Fleet Emissions Target

All vehicles will be plug-in hybrid or fully electric by 2034.



Big Idea 8: Continue to expand the integration of climate change mitigation, climate resilience, and sustainability into UMR curriculum and co-curricular activities.

Continued institutional and academic focus on climate change mitigation and community resilience will be critical as UMR educates future generations of students whose lives and health will be impacted by climate change. This could take the form of expanding public health courses and increasing the focus on diseases and conditions that may become more prevalent due to climate change. For more information, see the Climate Action Plan.



UMR has embedded aspects of climate action and resilience into the curriculum and programming. For example:

- UMR's Integrated 4 + 1 Master of Public Health in Environmental Health is a collaboration of UMR and the School of Public Health. Students investigate health hazards in the environment and the opportunities for public health policy to address these risks.
- UMR's EcoliteracySCHOOL (Students Collaborating in Health-Oriented Outdoor Learning) is a public health and environmental leadership program that brings college students together with high school students interested in biology and health science. Students experience shared environmentally focused curriculum, guided mentorship, and immersive field work.
- UMR's Capstone offering has proven to be an invaluable opportunity for students to study the relationships of public policy and global health.
- UMR's Sustainable Living Learning Community is where students with a shared passion for sustainability can connect with each other and with faculty and staff, including accessing academic support to craft individualized means of integrating sustainability into their academic experiences.

Case Study: Experiential Education

UMR Senior Lecturer Jessie Barnett Schimek and her colleagues inspire students to solve complex health issues. She and her co-authors¹⁵ describe the many campus pathways for undergraduate health science students to explore the relationship of environmental health and justice, the social determinants of health, and health inequalities. Faculty cultivate experiential learning through student-led research and community engagement, fostering self-discovery and passion for future career paths.

The experiences reveal that the students' experiential learning activities include an aspect of self-discovery that fuels the students' passions towards their career paths. Cassie Kersten ('16): *"My Capstone experience taught me the importance of contextualizing science and always keeping the bigger picture in mind. It is important to be able to communicate the goals and results of your project in order to make the desired change. This is especially important to remember in public health, where much of the research can make a major impact."* Cassie continued her UMR education at Emory University, earning a Master of Public Health in Global Epidemiology and now works in crisis management consulting to improve preparedness for emergencies, including those caused or worsened by climate change.

¹⁵ Osecki, Kristin, Barnett, Jessie, Majia, Angie. "Creating an Integrated Undergraduate Public Health Curricula: Inspiring the Next Generation to Solve Complex Public Health Issues" *Front Public Health*. 2022 Apr 18;10:864891. doi: 10.3389/fpubh.2022.864891. eCollection 2022

Big Idea 9: Advance climate and community resilience priorities on campus.

The following actions can be taken to move UMR toward climate action goals in the near term.

NEAR LONG CLIMATE ACTION

9.1 Take action to reduce water consumption on campus.

For UMR, reducing water demand in residential facilities will be a key consideration. Wasteful use of water not only “wastes” water, it also wastes energy. Energy is required to treat potable water, pump the water through the municipal system, and to treat the water at the sewage plant. Heating water represents another energy input.

NEAR LONG CLIMATE ACTION

9.2 Take action to reduce the volume of waste generation on campus, and establish a 3-stream waste management system.

In the near-term, UMR will work with the dining provider and staff, the UMN Procurement Office, Olmsted County, and other partners on developing a food rescue and composting program for the dining hall. Future expansion of composting and recycling throughout UMR buildings will also be explored. In support of this work, educational campaigns and training will decrease contamination of the three-stream waste management system. Across the UMN System, updated purchasing guidelines and increased education about sustainable options for common goods and reducing consumption will improve waste diversion rates and decrease the total amount of waste. Additional programming, such as having donation bins upon move out, will also create tangible and visible ways for students to contribute.

NEAR LONG CLIMATE ACTION

9.3 Sustain an equitable food access plan.

Continue to provide access to a discreet food pantry at UMR to ensure that vulnerable members of the community have access to healthy food. Continue to offer healthy food options in UMR food service locations, existing and future.

NEAR LONG CLIMATE ACTION

9.4 Continue to ensure the entire UMR campus community has adequate access to physical and mental health care.

Currently UMR offers student health care services in Olmsted Medical Center’s Skyway Clinic adjacent to the Student Life Center, and the University provides robust physical and mental health care for all employees. Access to quality health care builds resilience in individuals; it increases their capacity to withstand shocks and stressors in their own lives. Natural hazards made worse by climate change, such as extreme heat, flooding, drought, vector-borne diseases, and air pollution will continue to affect human health¹⁶ and underscore the importance of accessible physical and mental healthcare for the resilience of the UMR community.

NEAR LONG CLIMATE ACTION

9.5 Incorporate climate resilience into the Culture of Safety Plan.

Safety of the UMR population is a key goal of UMR. A focus on safety will be key at all times with well established strategies for times of power failure or a major event.

¹⁶ <https://climate.umn.edu/our-changing-climate/human-health>

9.6 Align with the City of Rochester's Emergency Management Plans.

Future weather predictions include the likelihood of more intense storms and associated power losses. It will be critical that UMR continue to expand and implement plans and strategies for such events to ensure the safety and well-being of faculty, staff, and students. This includes providing regular communication and guidance on staying safe during days of high heat, poor air quality, and other adverse conditions.

9.7 Regularly provide the UMR community with guidance about how to stay safe during days of high heat, poor air quality, and other adverse conditions.

Part of building community resilience is building the personal resilience and well-being of the individuals in the UMR community. Education and guidance related to how to stay safe on high-heat days, alerts about poor air quality, and building at-home emergency kits could provide individuals with the information they need to take informed actions.



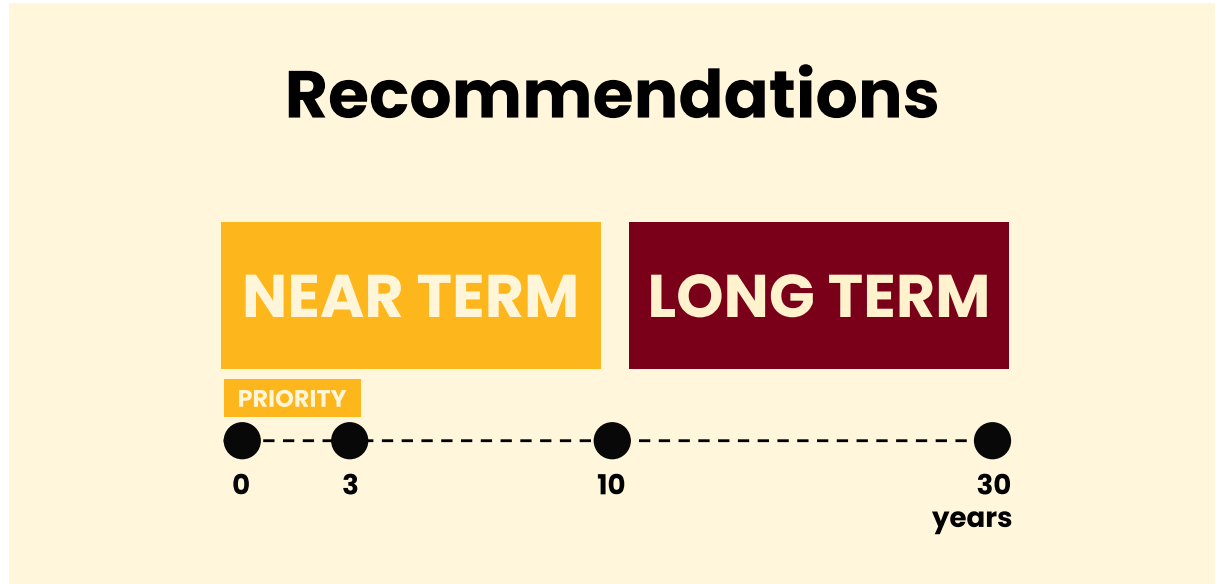
Implementation 6

Implementation

This Implementation section highlights priorities identified by UMR during the planning process through extensive engagement with leadership, students, faculty, and staff – especially those near-term initiatives which will support continued enrollment growth. For a complete list of recommendations, refer to the “Big Ideas” section.

The Campus Plan is a framework to guide facilities investments in response to managed enrollment growth, and to adapt to UMR’s changing context. Given the uncertain timeline of enrollment growth and the intensity of ongoing urban redevelopment in Rochester, the Big Ideas and recommended initiatives provide UMR with flexibility while ensuring alignment with University priorities.

Some of the plan’s recommendations are small in scale and can be implemented immediately, others are more complex and will be pursued through incremental steps. Most require collaboration with multiple community partners over years to effect the desired outcomes; key examples include connecting buildings in which UMR is a tenant to the City’s future Thermal Energy Network (TEN) to advance carbon neutrality goals, and co-developing specialty instructional and support spaces to meet needs shared by UMR and its partners.



SUMMARY

NEAR

1. **Create functional, healthy, and accessible UMR spaces.**

NEAR

LONG

CLIMATE

2. **Develop a “smart lease approach” to reach campus and climate action goals.**

NEAR

LONG

3. **Plan for new UMR specialty spaces.**

NEAR

LONG

CLIMATE

4. **Develop in the Education District to support enrollment growth.**

NEAR

LONG

5. **Work with partners to create additional specialty spaces.**

NEAR

LONG

CLIMATE

6. **Work with the City of Rochester and DMC on greenhouse gas emissions reduction goals and climate resilience—because UMR climate action success relies on collaboration.**

NEAR

LONG

CLIMATE

7. **Reduce emissions from vehicular transportation, and make sustainable commuting the easy choice.**

NEAR

LONG

CLIMATE

8. **Continue to expand the integration of climate change mitigation, climate resilience, and sustainability into UMR curriculum and co-curricular activities.**

NEAR

LONG

CLIMATE

9. **Advance climate and community resilience priorities on campus.**

Summary of all Big Ideas in this Campus Plan.

Near-term Priorities

Though the plan defines near-term as ten years, some initiatives should be pursued over the next one to three years to propel UMR beyond its start-up status. These initiatives will support new programs and address the space needs of today and the near future, as enrollment exceeds the Bold goal of 1,000 (anticipated by UMR in Fall 2024). Throughout the plan, these initiatives were marked as “Priority.”

Classrooms and Teaching Labs

Based on Fall 2023 enrollment, one additional active-learning classroom is needed immediately. UMR anticipates that a net total of three additional classrooms will be needed over the next two to three years depending on enrollment levels. Potential sources of increased classroom capacity include scheduling efficiencies, space reallocation within UMR’s existing footprint, and additional leased space. UMR will work with University staff to scope the need, explore alternatives, and deliver a capital project if necessary.

UMR’s current supply of teaching labs is generally sufficient until enrollment approaches the Boldest goal of 2,500 students served on campus, though this depends on whether lab coursework is required in new academic programs. However, some displacement of lab space could occur if existing lab(s) are converted to classrooms to serve future needs.

Office Space

Office space is a vital component of UMR’s strategy for student success and faculty/staff retention. As of Spring 2024, UMR needs one additional faculty office. No office capacity exists for the staff and faculty UMR must hire to support enrollment growth. It is unlikely that repurposing existing space and displacing occupants in University Square

or 318 Commons will yield a long-term solution, given the space needs of current faculty and staff, and the functional adjacencies that sustain UMR’s collaborative culture. UMR will work with University staff to scope the need, explore alternatives including consolidation and/or additional leased space possibly for an interim period, and deliver a capital project if necessary.

Some UMR staff functions may require space beyond the systemwide guidelines. Today, staff who serve as success coaches or admissions representatives typically use their offices to meet with students, which requires offices larger than typical. As enrollment grows, UMR and University planners will explore efficiencies of scale to understand at what point it will be more effective to create a suite of shared, small meeting rooms for such purposes. As enrollment approaches the Boldest and Boldest goals, UMR and University space planners will revisit the ASF metrics listed in the “UMR Today” section to scope space needs and evaluate options including building and/or leasing additional space.

Renovations to University Square

University Square anchors UMR’s campus life. As noted in Big Idea 1, several aligned objectives should be pursued in the renovation and potential expansion of the current UMR footprint. Sustained enrollment growth will drive increased demand for offices and active-learning classrooms. Renovations to the third and fourth floors, and even parts of the second floor, will strengthen UMR’s identity as a welcoming downtown presence, improve operations, and yield space efficiencies.

The following programmatic additions to University Square will support UMR’s continued delivery of success-enhancing, evidence-based learning for all students, including those historically underrepresented in higher education (low-income, first-generation, and BIPOC):

- **Create a Heart of the Campus.** Remake the atrium area as a central space for informal gathering, a welcoming campus living room, a bustling and flexible social space with abundant natural light and views to downtown.
- **Create an Internship and Career Center.** The Center will be a nexus of opportunities and training resources for UMR students as prospective interns, linking them to potential internship providers such as Mayo Clinic, Hormel Institute, and many others.
- **Create a second house/neighborhood.** UMR’s “house” model maintains cohesion among student cohorts as enrollment grows. As demonstrated by the success of the JustASK space in 318 Commons, the house combines faculty and success coach offices, study areas, and social spaces to serve both students and faculty by providing a supportive environment and a sense of collective identity. As a physical space to anchor collaborative academic activities, the house will be flexible, focused, and bright.

Instructional Development Center

UMR will explore project delivery options for a place to “educate the educators,” a professional development center that leverages UMR’s research-based pedagogy to serve UMR faculty, partner higher education institutions, and even K-12 science instructors from across the state. Conference and meeting space will be flexible to support various uses—including UMR’s existing functions.

Partnership Collaboration for Specialty Spaces

UMR will continue to build relationships with existing and potential partners to identify shared needs and potential project delivery pathways for those spaces so specialized that they would be infeasible for any one entity to develop or operate efficiently alone. These facilities could be developed and operated primarily by one or more of UMR's partners such as DMC, Mayo, the City, or others.

- **Immersion Learning Lab** - A partner-hosted space featuring the emerging technologies in the health sector will benefit UMR, the School of Nursing and other education partners, among others, by preparing students for the next generation of health care. A related recommendation is Big Idea 5.2 Active Learning Opportunities at Mayo which identifies Mayo-hosted active learning spaces to expose UMR students to the opportunities offered in a world-class clinical care and research setting.
- **Gymnasium for intramural sports and other campus activities** - UMR does not have convenient access to a gymnasium for year-round recreation, a need regularly expressed by students, faculty, and staff. The small workout room and pool in the Student Life Center are not sufficient to serve the entire UMR community—today or as enrollment grows. UMR will engage public and private partners to explore opportunities for a gym located conveniently near campus. At the same time UMR will continue to engage the City and DMC in hopes that the planned \$65M Regional Sports and Recreation Complex can serve UMR needs, though the site for the Complex is yet to be determined.

- **Childcare** - Access to childcare services in or adjacent to downtown is a need the UMR community shares with multiple partners, and is a major recruitment and retention consideration for all. UMR and the University will work with DMC and others to explore potential sites and operational models to deliver childcare. The Campus Plan identified the Education District as one potential site, for example in a partner-developed building on a long-term land lease on University property. This scenario would require extensive consultation with the University's Real Estate Office.

Partnership for Climate Action

UMR shares carbon neutrality, sustainability, and climate resiliency goals with many partners, including the City and DMC. UMR will continue to advocate and support initiatives in alignment with the plan's drivers and principles.

- **Green Leasing Strategies and TEN** - Lease extension options for University Square, Residence at Discovery Square, and 318 Commons will expire in the near-term. The University's Real Estate Office will work closely with UMR leadership and operations staff to deploy the smart leasing approach and to engage current and potential lessors around terms for green lease agreements. See the Climate Action Plan for more information. Rochester Public Utilities' decarbonization and the City's future TEN are central to UMR's climate action goals. UMR and the University will work with the City, DMC, and building owners and operators to encourage network expansion and to ensure readiness to connect UMR-occupied buildings.

- **Transit and Mobility Improvements** - The implementation of LinkBRT - which is planned to be free of charge for all users - and other mobility improvements to the downtown area will support UMR's commuting goal and will enhance connectivity among UMR buildings. Public electric vehicle charging infrastructure will also support the adoption of electric vehicles by the UMR community.
- **Resilience Work Plan** - The City's Sustainability and Resiliency Work Plan aligns with UMR's strategies to build resilience on campus and in the community by expanding access to necessities and continuing to build resilient infrastructure.

318 Commons

UMR will re-activate the Nest, a former restaurant space on the ground floor that is well suited to student recreation, informal food service, and events. Long-term enrollment growth will drive a need for more student housing that can be accommodated in part by reclaiming space on 318 Commons' upper floors currently sub-leased to third parties.

Outdoor Recreation

UMR will continue to pursue partnership with the City to make outdoor recreation facilities available to students, faculty and staff. Soldiers Field Memorial Park south of downtown could be better linked with UMR facilities and the Education District by extending City trails through the Education District to connect with the existing network.

Wayfinding and Campus Safety

UMR will partner with building owners, DMC and the City to ensure UMR-specific needs for wayfinding and campus safety are integrated with building operations and downtown initiatives.

Education District

The Education District will evolve to accommodate the extension of the riverfront walk connection through the Education District to Soldiers Field Memorial Park. UMR is already maintaining native grasses and trees on top of the capped former industrial site in the Education District. In the near-term, the use of low maintenance plant communities should continue. Additional temporary activations might include outdoor sports pop-ups, or other temporary uses. The Education District is a potential site for some near-term partnership initiatives and facilities (childcare, for example - see above). The University's Real Estate Office will develop terms for land-lease or other agreements with partners in consultation with UMR. In the long-term, as enrollment approaches the Boldest goal of 2,500, the University will scope major new facilities in the Education District. During the planning process, the UMR community voiced strong support for student housing in the Education District, particularly housing for older, more independent student cohorts.

Long-term Priorities

As enrollment grows, development in the Education District will expand to provide housing, a mobility hub, and other amenities. The lease extension options for the Student Life Center, One Discovery Square, and Two Discovery Square will expire in the long-term. The University's Real Estate Office and UMR leadership will evaluate whether to relocate these uses to the Education District, or to apply the smart leasing approach downtown. In any scenario, UMR will continue to have a strategic leased presence in the downtown area. Actions taken in the long-term will continue to advance plan drivers and principles, including reaching carbon neutrality.



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UNIVERSITY OF MINNESOTA

University of Minnesota Rochester Climate Action Plan

Spring 2024

Presented to the Regents of the University of Minnesota

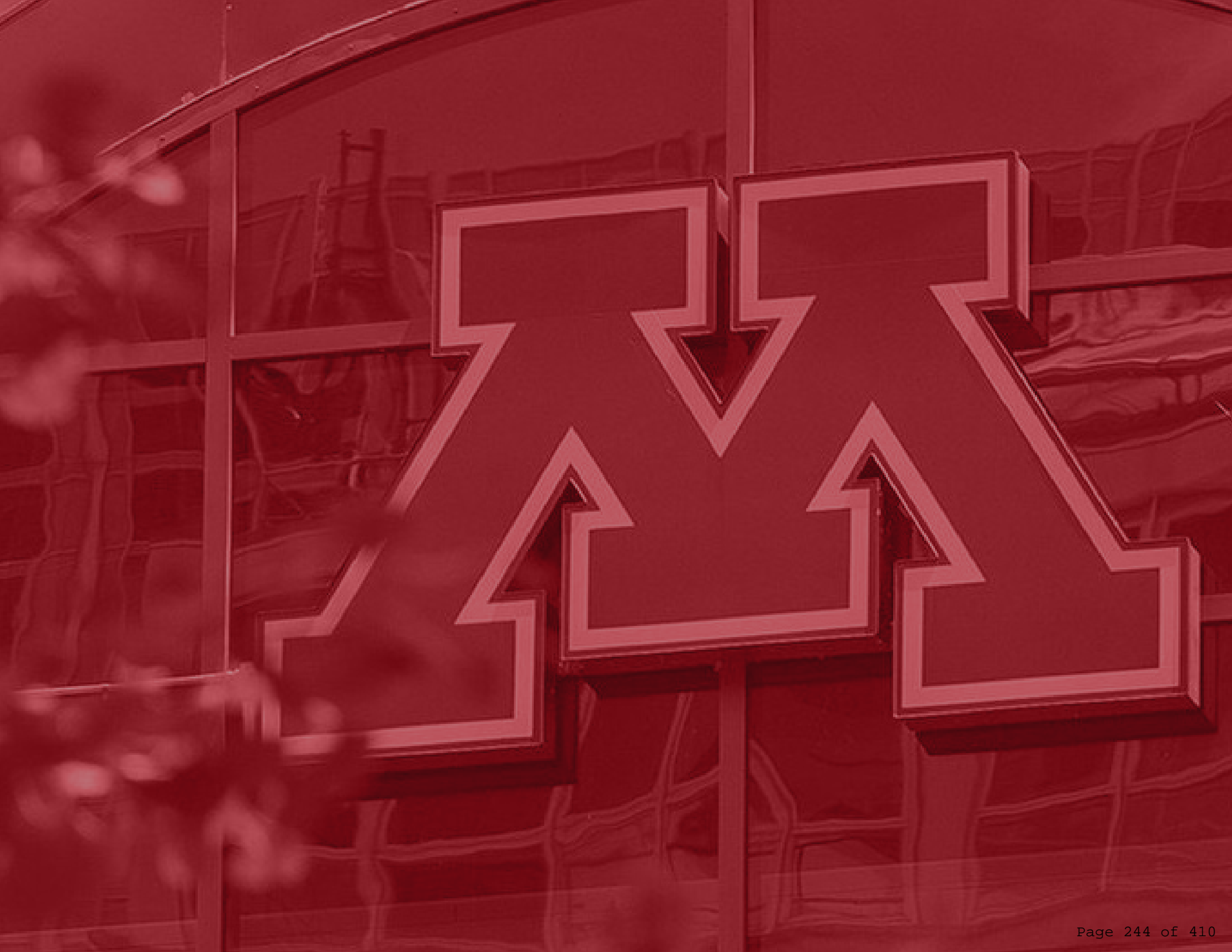
June 13, 2024

The University of Minnesota Rochester's Land Acknowledgement

The University of Minnesota Rochester is located on the traditional, ancestral, and contemporary lands of the Dakota, Ho-Chunk, and other Native peoples. By offering this land acknowledgment, we affirm tribal sovereignty and will work to hold the University of Minnesota Rochester accountable to American Indian peoples and nations.

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Executive Summary

Executive Summary

The University of Minnesota Rochester Climate Action Plan provides a road map for the campus to achieve carbon neutrality by 2050 or earlier and build resiliency to the expected impacts of climate change.

Global climate change is considered one of the greatest challenges of the 21st century and is an existential threat with dire consequences for people, communities, and ecosystems—both locally and globally. The University of Minnesota Rochester Climate Action Plan (UMR CAP) is a step towards eliminating greenhouse gas (GHG) emissions on campus and addressing climate vulnerabilities in alignment with other campus goals and mission objectives.

The UMR CAP was developed in concert with the 2024 UMR Campus Plan to address intrinsically linked strategic goals stated in MPact 2025. Together, the UMR CAP and Campus Plan advance MPact 2025's systemwide commitments to build a fully sustainable future and to develop a comprehensive long-range capital facilities and landholding strategy to drive strategic growth.

Greenhouse gas emissions (GHG) and carbon are often used interchangeably, but they are different. GHG emissions are the gasses released into the atmosphere that contribute heat (the GHG effect and global warming). Carbon emissions are a significant contributor to GHGs. Other contributing gasses are methane, nitrous oxide, and fluorinated gasses.

GHG Reduction Targets

The University of Minnesota has a systemwide commitment to achieve carbon neutrality by 2050 or earlier. Through implementation of this plan, UMR will reduce GHG emissions 85% by 2034 and achieve carbon neutrality by 2050. Emissions from electricity is the largest source of campus GHG emissions. The electricity provider, Rochester Public

Utilities (RPU), has committed to decarbonizing the electricity supply by 2030, which will have a dramatic impact on reducing GHG emissions. Eliminating natural gas use for heating, hot water, and cooking in campus spaces is the next most impactful action. Transportation-related strategies make up the remaining emissions reductions described in this plan.

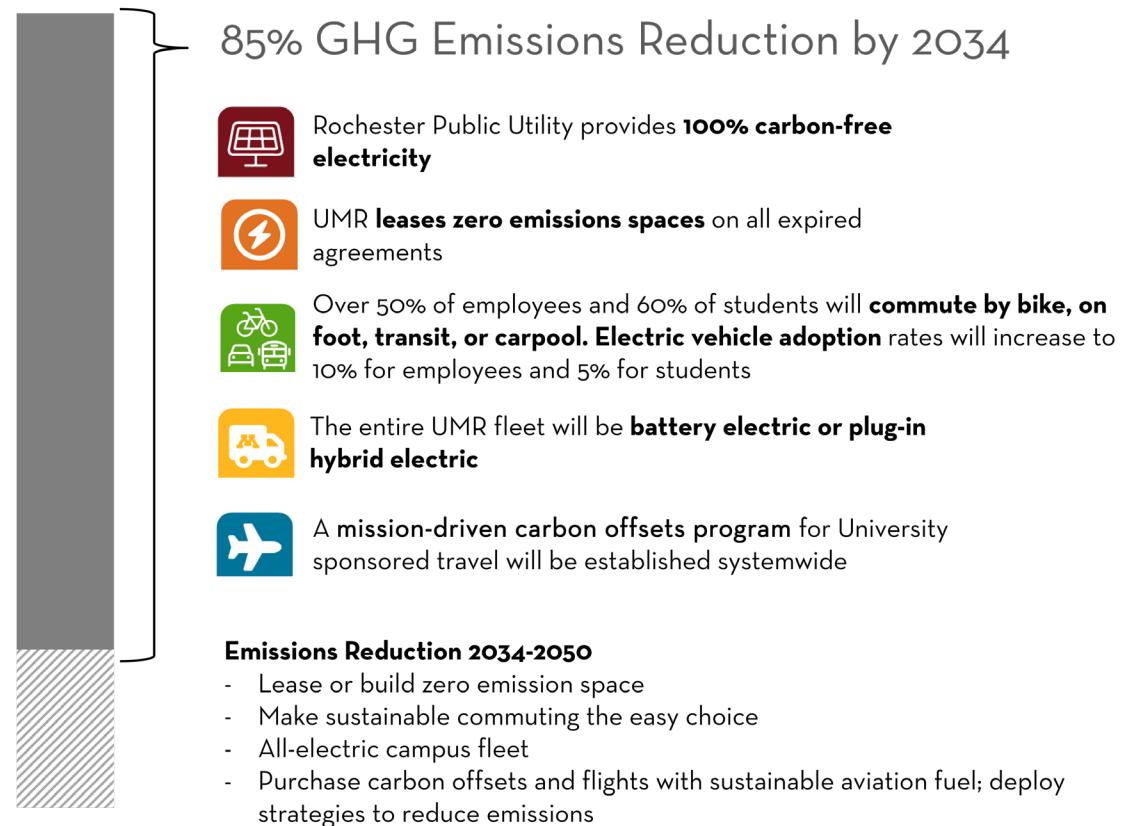


Figure 1: GHG emissions reduction pathway to achieve an 85% reduction by 2034 compared to baseline on the way to carbon neutrality by 2050.

Climate Adaptation and Resiliency Recommendations

The CAP reports on climate change modeling for Olmsted County and identifies adaptation measures to support campus and community resilience. These actions are aligned with the City of Rochester's 2021 Sustainability and Resiliency Community Work Plan and provide a foundation for future climate resilience work. The adaptation measures include:

- Create design guidelines for buildings, infrastructure, and land that incorporate future climate projections, improvements for well-being, and redundancies for critical operations.
- Partner with the city and other partners to advocate and plan for effective public transportation options that provide safe and cost-effective ways to commute and get around.
- Focus UMR field teaching (outreach) activities on projects with benefits to environmental justice neighborhoods and communities.
- Reduce water consumption on campus.
- Take action to reduce the volume of waste generation on campus, and establish a three-stream waste management system.
- Develop an equitable food access plan.
- Partner to ensure the entire UMR campus community has adequate access to physical and mental health care.
- Incorporate climate resilience into the Culture of Safety Plan.
- Align with the City of Rochester's Emergency Management Plans.
- Regularly provide the UMR community with guidance about how to stay safe during extreme weather events.

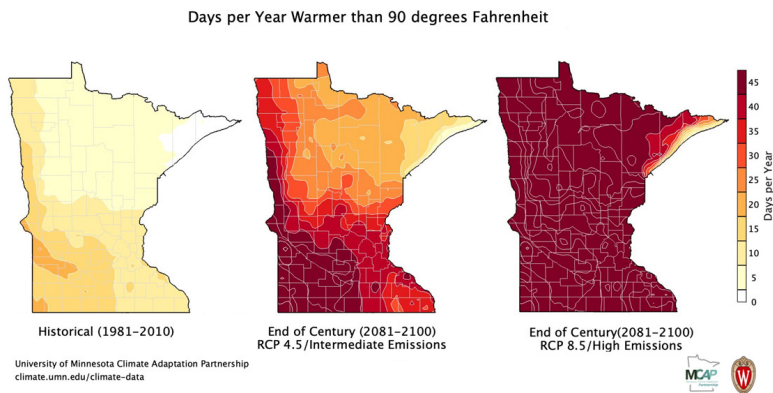


Figure 2: Average Number of Days Per Year When the Daily High Exceeds 90°F.

Source: University of Minnesota Climate Action Partnership. (2023b.). As modified from University of Wisconsin Probabilistic Downscaling v2.0. | David Lorenz and the Nelson Institute Center for Climatic Research. <https://climate.umn.edu/our-changing-climate/extreme-events>

UMR's Role in Supporting Partners

UMR's commitment to partnership extends to climate action and involves activities, which advance carbon reduction and climate resilience. These are:

- Advancing UMR's research, teaching, and student engagement with the community on issues of climate change and the effect on public health and the social determinants of health.
- Supporting the development of a carbon neutral energy system through locally-generated renewable electricity and the City's future Thermal Energy Network (TEN).
- Encouraging UMR students, faculty and staff to walk, bicycle, and use public transport to commute as a means of contributing to the goals of the local multimodal transportation network.
- Supporting local businesses and a thriving downtown.

Implementation Support

UMR and UMN System will implement this plan by improving campus GHG accounting, creating a campus culture of sustainability, developing financing and funding strategies, and building internal capacity. See Chapter 4 Implementation for more details.

What's in a name? New terms for new approaches.

Green lease (also called a high-performance lease, or energy-efficient lease) is a lease agreement in which tenants and landlords commit to and work together to achieve energy efficiency, energy use, and other sustainability targets. More information on green leasing is available through the Green Building Alliance at www.gba.org.

Smart lease (or the smart leasing approach) refers to a decision making process outlined in the UMR Campus Plan that enables the University to vet locations based on a matrix of principles and priorities.





Introduction 1

Purpose of the Campus & Climate Action Plans Framework

A Systems Approach

The University of Minnesota System is developing an integrated set of Campus and Climate Action Plans to align the future of each campus with systemwide goals. The coordinated plans will ensure alignment between physical place-based changes and climate action commitments at all campuses. The purpose of each set of plans is to develop consensus around a shared vision for the future of the campus, and to identify actionable steps for supporting its mission and goals.

Each campus of the University of Minnesota System plays a pivotal role in fulfilling the tripartite mission of the University, advancing learning, research, and outreach throughout Minnesota. Each has its own unique identity, valued by students, faculty, staff, and the surrounding community. This integrated planning effort provides each campus with a framework for future decision-making and implementation to support each individual institution's needs while advancing goals identified in the systemwide strategic plan, MPact 2025.

Campus and Climate Action Planning at the University of Minnesota Rochester

The UMR CAP presents an overview of planning drivers and principles shared with the Campus Plan, and points to additional shared content throughout the document. The CAP presents strategic opportunities for meaningful improvements to reduce greenhouse gas emissions (GHG) and build resiliency over the near-term and long-term time horizons. This is followed by recommendations to support implementation, including continued partnership, fostering a culture of sustainability, building capacity, leveraging new and existing finance tools, and systemwide collaboration.

UMR's Historic Sustainability Efforts

This is UMR's first climate action planning process and it builds upon a history of sustainability efforts at UMR and throughout the System. UMR has integrated sustainability into curriculum through its EcoliteracySCHOOL (Students Collaborating in Health-Oriented Outdoor Learning) and leases space in a LEED certified building at One Discovery Square. Independently, UMR is also pursuing WELL certification at 318 Commons. The CAP also builds on institutional commitments, including:

- the University of Minnesota Board of Regents Policy, Sustainability and Energy Efficiency established in 2004; and
- the University of Minnesota System's pledge in 2008 to reach carbon neutrality by 2050 or earlier, and to integrate climate change into research and curriculum through the American Universities and Colleges Presidents' Climate Commitment, now known as the Second Nature Carbon Commitment.

Planning Process

The Campus and Climate Action Plans shared a rich engagement process with regular input from an advisory committee, community stakeholders, faculty, staff, and students through interviews, open houses, and map-based data collection activities. The input from campus and community voices on climate action and sustainability is reflected in the breadth of recommendations in this plan, from campus operations to civic partnerships.

The near-term horizon for the UMR CAP is ten years, through 2034. Other recommendations for physical change are linked to a long-term horizon through 2050. Updates to the plan will occur approximately every ten years to accommodate shifting needs and priorities for the UMR campus.

For more information on the planning process, refer to the Campus Plan.

Planning Drivers

Both the Campus and Climate Action Plans have been informed by key drivers—some shared across the University System, and some unique to UMR. The drivers that impact the UMR Climate Action Plan are described in this section.

Systemwide Strategic Plan: MPact 2025

The UMR Campus Plan and the Climate Action Plan advance the systemwide strategic plan, MPact 2025, through developing a comprehensive long-range capital facilities and landholding strategy to drive strategic growth (Commitment 5, Action Items 5.3) and developing a climate action plan to contribute to building a fully sustainable future (Commitment 2, Action Items 3.2). Many of the Plans' recommendations embody other commitments outlined in the MPACT 2025 plan, as noted below.¹

Student Success

Student success is supported by many recommendations throughout the Plans, in particular by the idea of creating a “Heart of the Campus” at University Square—a place where students can gather informally, find support services and amenities, and receive academic assistance at “JustASK” locations.

Discovery, Innovation, & Impact

Recommendations in the Plans support UMR student engagement and partnership goals with the intent of fostering discovery and educational innovation, extending opportunities for community engagement and experiential learning, and continuing UMR's role as a strong partner in downtown Rochester.

¹ <https://president.umn.edu/mpact-2025>

MNtersections

The Plans prioritize spaces for collaboration to serve as a model in health education while demonstrating state and worldwide leadership in sustainability.

Community & Belonging

The Plans identify strategies to develop places for UMR students, faculty, staff, and partners to gather with the goal of fostering community and belonging on campus and in the surrounding context.

Fiscal Stewardship

The Plans provides near-term and long-term strategies for optimizing building leases, creating shared programming, and aligning future facility development in the interest of UMR's sustainable future.

Board of Regents Systemwide Planning Principles

The Board of Regents approved campus planning principles in February 2021, listed below. These ensure the effectiveness of campus plans and are the foundation of Regents' review and ultimate approval of each location's Campus Plans. The UMN System has a long history of regularly updated campus physical plans, which have traditionally been known as campus master plans.

1. Establish a sustainable vision of how the physical setting of each campus will embody its distinctive history, mission, and future.
2. Create an inclusive and welcoming experience for the increasingly diverse range of people who come to campus.

3. Optimize existing physical assets to facilitate flexible and innovative solutions toward an enduring future.
4. Consider the cost of attendance, investment, and operations when planning for each campus' future.

Integrate each campus' master plan with the Systemwide Strategic Plan. Ensure an inclusive, accountable, and forward-looking process for developing and implementing the Campus Plan.²

University of Minnesota Rochester Vision

The University of Minnesota Rochester empowers health sciences professionals to solve the grand health challenges of the 21st century and maintains unique collaborations with the adjacent, world-renowned Mayo Clinic.³

UMR's strong mission and vision, as well as strategic growth priorities of learning, resource stewardship, collaboration and communication are significant drivers of this CAP. The development and implementation of the plan will demonstrate to students and our community the importance of institutional transformation for the health of people, communities, and ecosystems.

² The full text is available at <https://regents.umn.edu/february-2021-board-regents-meeting>

³ <https://r.umn.edu/about-umr>

UMR Grounding Values

UMR's community-designed grounding values are embedded in the UMR vision and articulate a collective belief in the transformative power of higher education. These values are the guideposts for the University's vision, and are key drivers of this plan.

- **Respect:** We value habits of interaction that demonstrate the worth and the dignity of each person.
- **Human Potential:** We value every person's capacity to learn, develop, imagine, create and contribute.
- **Community:** We value collective work and a culture of trust that promotes collaboration, problem-solving, and partnerships while creating belonging, accountability and courageous action.
- **Diversity and Inclusiveness:** We value the range of human differences and the active pursuit and involvement of varied perspectives.
- **Evidence-Based Decision Making:** We value strategic collection and careful assessment of data to inform our choices in all matters, including student learning and development.⁴

⁴ <https://r.umn.edu/about-umr>

UMR Strategic Commitments Since 2019 Bluff Top View

UMR continues to work towards excellence while expanding its impact. Key strategic commitments in recent years that contribute to future planning considerations include the following:

- Sustain educational excellence, including equity in student outcomes;
- Grow total enrollment as delineated in the Bluff Top View plan (now in MPact 2025), using the framework of the six pathways and evidence-based practices;
- Grow resources, including
 - Generating new revenue from industry partnerships, benefactors, foundations, and research grant ICR dollars;
 - Acquiring appropriate and affordable space; and
 - Strategically hiring new human resources and supporting the growth and well-being of current employees;
- Grow reputation as educational innovators in higher education.

Enrollment Goals

UMR's enrollment goals are identified in the 2019 Bluff Top View Report.⁵ Fall 2023 enrollment was 932 students, just shy of the "Bold" goal of 1,000. The "Bolder" goal is 1,500 students, and "Boldest" is 2,500 students. All UMR enrollment data cited here refers to "students served on campus," including UMR's core undergraduate programs and several intra-system partner academic programs, such as the Twin Cities Nursing program. This plan considers the implications of all three of

⁵ <https://regents.umn.edu/sites/regents.umn.edu/files/2023-02/docket-mis-feb2023.pdf>

these enrollment growth scenarios, and offers recommendations as strategic tools. The actual timeline for enrollment growth is uncertain, but will depend in part on University support to implement many of the recommendations in the Campus and Climate Action Plans. Enrollment growth is a driver for emissions that can be mitigated by taking steps in the CAP.

Leasing Timelines

UMR currently leases all of the building space it occupies. This affects the strategies that can be deployed in the near-term to reduce emissions independent of mutually beneficial investments with landlords. In congruence with enrollment growth and leasing timelines, the University will have opportunities to advance decarbonization goals through new lease agreements and through future construction in the Education District.

Climate Action Goals in the Rochester Community

UMR is not alone in its commitment to envision a more sustainable future and draw down GHG emissions in Rochester. Many community partners are working towards climate action goals, both individually and collectively.

Olmsted County has named 32 initiatives to reduce emissions associated with energy use and to mitigate climate change impacts on natural resources, people, transportation, waste, and materials.⁶ The short-term initiatives are simple to institute and the long-term ones are more ambitious, such as building a transportation network rich with options that are appealing to the public and that will reduce emissions.

⁶ <https://www.olmstedcounty.gov/government/about-olmsted-county/climate-mitigation-and-adaptation>

The City of Rochester was the first Minnesota city to attain LEED Gold certification in 2018, and has established GHG emissions reduction goals of 50% by 2030 and 100% by 2050.⁷ One way the City is working to realize its goal is through the development of a Thermal Energy Network (TEN). The TEN will provide heating and cooling to locations around the city with an ambient loop geothermal system. The City has had success transitioning the City Hall to this technology, and is working collaboratively to develop plans for expanding the system to other parts of the city. The City's goals include connecting the TEN to privately owned buildings such as those leased by UMR. Paired with Rochester Public Utilities' goal to provide carbon free electricity by 2030, all buildings connected to the future TEN will be carbon neutral.

The City of Rochester's Sustainability and Resiliency Task Force - composed of government agency employees, DMC staff, nonprofit leaders, business owners, representatives of UMR,⁸ and residents - created a vision statement and policies that propel the city towards lower carbon emissions, assume a holistic view of health in serving all residents, ensure neighborhoods are sustainable, resilient and reflective of their residents, provides affordable and accessible transportation for all, builds and maintains a resilient economy, and enhances the health of the city's natural environment.

One of Destination Medical Center's (DMC) guiding principles is to be a model for sustainability that will strive to implement ecological urban design and building practices to improve and enhance the environment and quality of life. Strategies for achieving this include supporting clean energy and emissions reduction district-wide. The energy efficiency target cited in the DMC sustainability framework plan is a 25 percent reduction in total energy use.⁹

Mayo Clinic's climate action commitments are documented through their participation in the U.S. Department of Energy's program, the Better Climate Challenge. This includes reducing greenhouse gas emissions by 50% and reducing energy use intensity by 20% by 2032. Mayo Clinic has been pursuing energy conservation for many years, and has reduced its energy use by 20% since 2010.¹⁰



Student Success and Employee Well-being

Students and employees choose UMR to receive or provide a top quality health education in an innovative, evidence-based learning environment. Classrooms and campus spaces that are energy efficient, promote health and well-being, and are decarbonized demonstrate how the physical environment contributes to personal and community health.

By demonstrating action on greenhouse gas emissions reduction and other climate action goals, UMR can lead by example. According to the survey conducted by the UMN Climate Adaptation Partnership (MCAP), 76 percent of Minnesota residents are concerned about climate change, which increases to 85% when focused on Gen Zers.¹¹ The American Psychological Association reports that 68% of adults say they experience some level of "eco-anxiety" and that the 18-34 year cohort experiences this more distinctly: 47% report that they experience stress relating to the climate change they understand to affect their daily lives.¹² Taking public action on climate can help to support the well-being of concerned students and the campus community at large.

⁷ <https://www.rochestermn.gov/Home/Components/News/News/9204/1121>

⁸ UMR was represented by Jay Hesley, Senior Advisor for Strategic Partnerships, and Marco Lanz, UMR's former Director of Alumni and Development Relationships

⁹ <https://dmc.mn/sustainability-in-the-dmc-district/>

¹⁰ <https://www.communityengagement.mayoclinic.org/environmental-stewardship>

¹¹ <https://climate.umn.edu/news/cfans-mcap-insights-survey-shows-76-minnesotans-concerned-about-climate-change>

¹² <https://www.apa.org/news/press/releases/2020/02/climate-change>

Planning Principles

The Campus and Climate Action Plans are guided by four principles identified during the consultation process with the campus community. The principles provided direction in the design and decision making process. Each of the principles is summarized and explained in this section.



Flexibility & Adaptability

Physical Space: Flexible spaces are important for a variety of learning and collaboration needs. Faculty and students need to be able to configure classroom and collaboration spaces for a variety of teaching and learning styles as well as informal activities. This requires adequate space and moveable furniture and technology.

Decision-Making: Recommendations in this plan should facilitate UMR growth in the near-term and support UMR stability in the long-term. UMR will need flexibility and adaptability in decision-making as enrollment grows, and as new technology and financing becomes available for building decarbonization strategies.

In practice, this looks like: Designing buildings that are adaptable to a changing climate and to emerging technologies.



Proximity & Connection

Proximity within UMR and the Rochester community can foster long-term relationship-building and serendipitous connections that directly contribute to student and community success. It is important that UMR facilities are within a 10 minute walk of one another, preferably connected via the skyway or subway network in Rochester. Currently, all UMR facilities with the exception of One Discovery Square, Two Discovery Square, and Residence at Discovery Square are connected via the skyway network. Similarly, prioritizing spaces along the City of Rochester's future Thermal Energy Network may unlock specific opportunities for achieving climate action goals.

In practice, this looks like: Prioritizing lease opportunities along the skyway network and future TEN during any near-term space moves.



Inclusivity & Welcoming

Continue supporting, and look to better support, the needs of all academic, housing, and student life spaces. UMR is a diverse community of learners coming from a variety of backgrounds and many are first time college students in their families. Many come from rural areas and experience their first urban environment in Rochester. In response, great care is needed to ensure that welcoming, inclusive spaces are provided for the student body in academic, social and housing environments. In considering community resilience, attention must be paid to the needs of the most vulnerable.

In practice, this looks like: Ensuring that the Culture of Safety plan includes the perspectives of many demographics, and ensuring any food pantries are convenient and accessible for all.



Optimization & Climate Action

Physical assets will be optimized to support all UMR and system-wide goals, including student learning, campus culture, healthy buildings, climate action, and fiscal stewardship. Optimizing spaces for efficiency and emissions is a priority, as is planning for future climate conditions.

In practice, this looks like: Utilizing a Smart Leasing approach in the near-term and long-term. It will be critical for the University to negotiate Smart Leases that deliver on qualitative and quantitative climate action goals.

UMR's Culture of Safety Plan seeks to establish a welcoming and inclusive campus that promotes a culture of safety where all are welcome and feel welcomed to express themselves by:

1. Effectively using and strategic placing of safety infrastructure;
2. Effectively planning and preparing for a variety of incident responses using a solid and tested platform from which to build;
3. Providing educational opportunities and promoting resources, good practice, and awareness of the campus environment; and
4. Leveraging community relationships and partners who share.

Climate Change in Minnesota

The Intergovernmental Panel on Climate Change (IPCC) is the United Nations body for assessing the science related to climate change. The IPCC synthesizes the work of nearly 1,000 of the world's top scientists in the study of climate change and is regarded around the world as the guide for national policy, regulations, and practices to mitigate climate change. It is the resource for federal, state, commercial, and academic climate modeling. The IPCC's Sixth Assessment Report¹³ finds that human-induced global warming is responsible for 2°F of warming and documents the impacts of that change. Human-generated GHG emissions, including carbon dioxide and methane, are primary drivers of climate change and thus are the focus of global and local activity to reduce emissions.

Climate modeling of Minnesota shows the impact of climate change in the state is likely to include: warmer and wetter spring and winter seasons, annual increases in average temperatures, more extreme storms with intense flooding, alterations to ecosystems, destruction or accelerated deterioration of property, new and exaggerated challenges to public health and reduced agricultural yield.¹⁴ In 2019, the State of Minnesota created a Climate Change Subcabinet and Governor's Advisory Council on Climate Change, charging them with the responsibility to coordinate state efforts to mitigate climate change and advance resiliency. The Minnesota Climate Framework guides this work by setting a vision on how to address and prepare for climate change and meet the state's carbon neutrality commitment by 2050.¹⁵

¹³ IPCC, 2022: Climate Change 2022: Impacts, Adaptation, and Vulnerability. Contribution of Working Group II to the Sixth Assessment Report of the Intergovernmental Panel on Climate Change [H.-O. Pörtner, D.C. Roberts, M. Tignor, E.S. Poloczanska, K. Mintenbeck, A. Alegria, M. Craig, S. Langsdorf, S. Löschke, V. Möller, A. Okem, B. Rama (eds.)]. Cambridge University Press. Cambridge University Press, Cambridge, UK and New York, NY, USA, 3056 pp., doi:10.1017/9781009325844.

¹⁴ <https://climate.umn.edu/>

¹⁵ <https://climate.state.mn.us/minnesotas-climate-action-framework>

Working Towards Environmental Justice

The burdens of environmental pollution, including those associated with climate change, are disproportionately borne by Black, Indigenous, and people of color (BIPOC), people in poverty, and the disenfranchised. While the CAP will lead to reducing carbon emissions and other local air pollutants that negatively impact human and environmental health in census tracts identified as environmental justice areas of concern by the Minnesota Pollution Control Agency, much more work remains to be done. As such, environmental justice is identified as an issue that endures as important to the University.





University S



Carbon Mitigation 2

Categorizing UMR GHG Emissions

The University of Minnesota's commitment to carbon neutrality by 2050 was made in 2008 when it signed the American College and University Presidents' Climate Commitment, now known as the Second Nature Carbon Commitment. To act on this commitment, UMR started tracking GHG emissions in 2009. However, limited staff capacity and limited access to the appropriate data drove irregular GHG inventory practices and inconsistencies from year to year. Moving forward, UMR will track the following GHG emissions:

- Scope 1 emissions from sources controlled or owned by an organization (as relevant to UMR: fossil fuels purchased directly for heating, cooling, and fleet vehicles)
- Scope 2 emissions from the purchase of electricity, steam, heat or cooling (as is relevant to UMR: purchased electricity, cooling, and steam)
- Scope 3 emissions associated with assets that are not owned or controlled by the reporting entity, but are part of the organization's value chains (as is relevant to UMR: commuting, University sponsored air travel, and emissions from leased space)¹⁶

In the future, the University will evaluate if additional data can be collected across more categories of emissions to expand its climate action focus.

¹⁶ UMR building emissions from natural gas and electricity are considered Scope 3 because they come from leased assets in which the University does not have direct control over the facilities, system types installed, and day-to-day operations. "Categorizing GHG Emissions Associated with Leased Assets Appendix F to the GHG Protocol Corporate Accounting and Reporting Standard - Revised Edition June 2006, Version 1.0" <https://ghgprotocol.org/sites/default/files/2022-12/Categorizing%20GHG%20Emissions%20from%20Leased%20Assets.pdf>

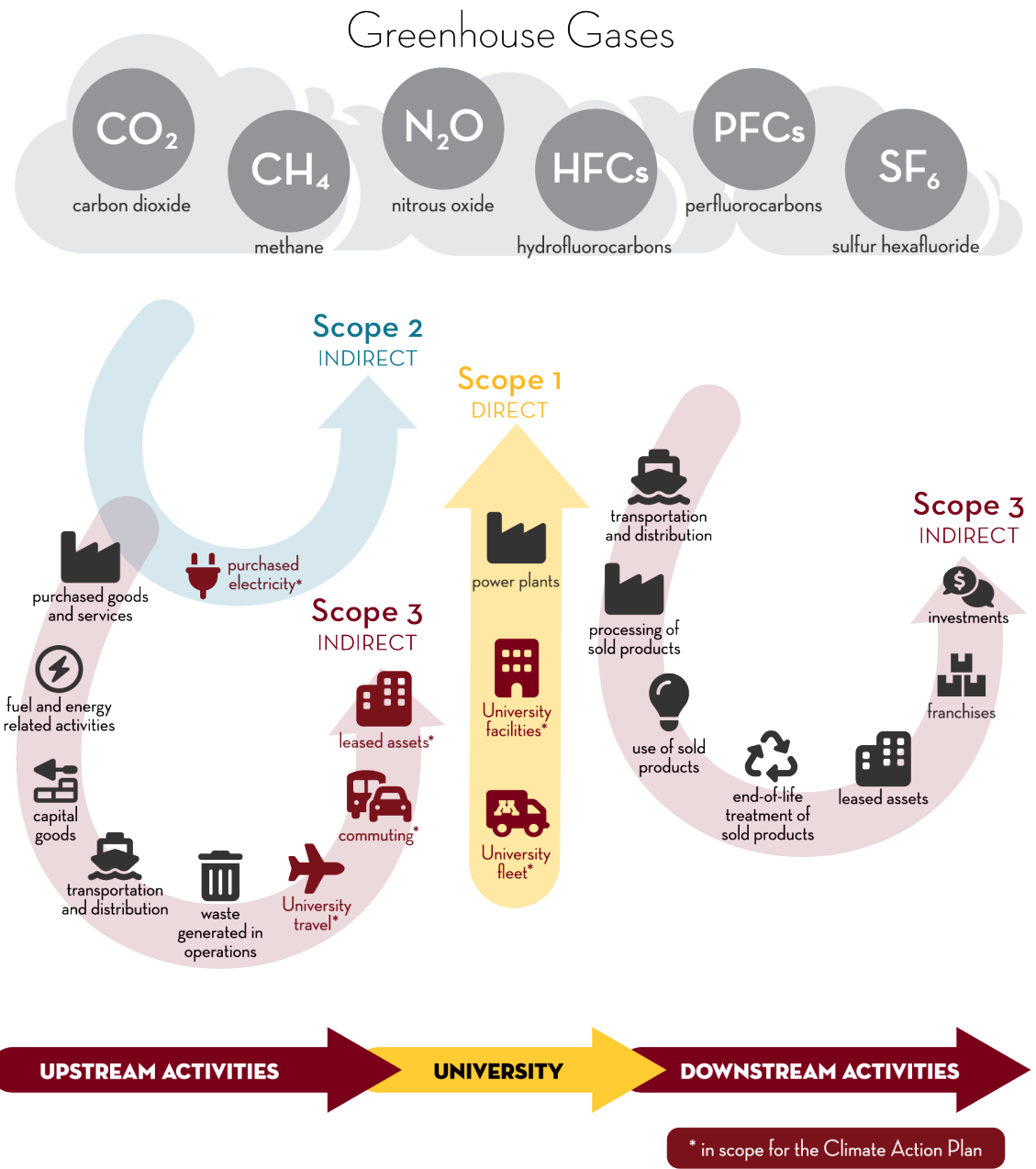


Figure 3: Emission scopes illustration.

Modified by UMN based on WRI/WBCSD Corporate Value Chain (Scope 3) Accounting and Reporting Standard (PDF), page 5 (https://ghgprotocol.org/sites/default/files/standards/Corporate-Value-Chain-Accounting-Reporting-Standard_041613_2.pdf).

Baseline Campus Emissions

The baseline GHG emissions data inventoried for this plan largely employ University data for 2022 and 2023. Where gaps in data exist, models were utilized to determine emissions.¹⁷

Figure 4 shows the estimated baseline of campus emissions. The estimated baseline is a composite of historical data from recent years accounting for the impacts of the COVID-19 pandemic and modeled data to account for recent space changes. Details on the methodology for developing the greenhouse gas inventory and the baseline are available in Appendix B.

The Path to Carbon Neutrality

The CAP outlines UMR's path to near-term (2034) interim carbon reduction targets on the way to carbon neutrality for its inventoried GHG emissions by 2050 or earlier. Figure 5 shows projected campus emissions over time and projected GHG savings by meeting near- and long-term targets. UMR will eliminate 85% of GHG emissions by 2034 compared to baseline. The projections for 2034 and 2050 assume UMR's Boldest enrollment growth impacts on commuting trips and space demands. With this growth, the projected GHG savings from implementing the climate action strategies in 2050 includes the assumption that a new 210,000 ASF, all-electric, zero emissions student residence.

¹⁷ UMR leased area emissions were calculated using whole building energy usage, UMR area only metering, and industry benchmarks.

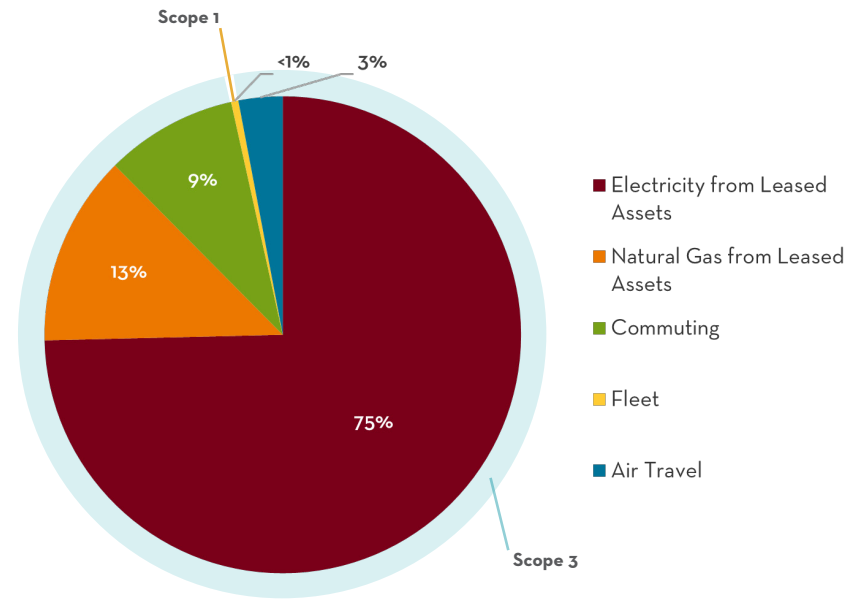


Figure 4: UMR estimated GHG emissions baseline by source. Emissions total to 3,270 MTCO_{2e}.

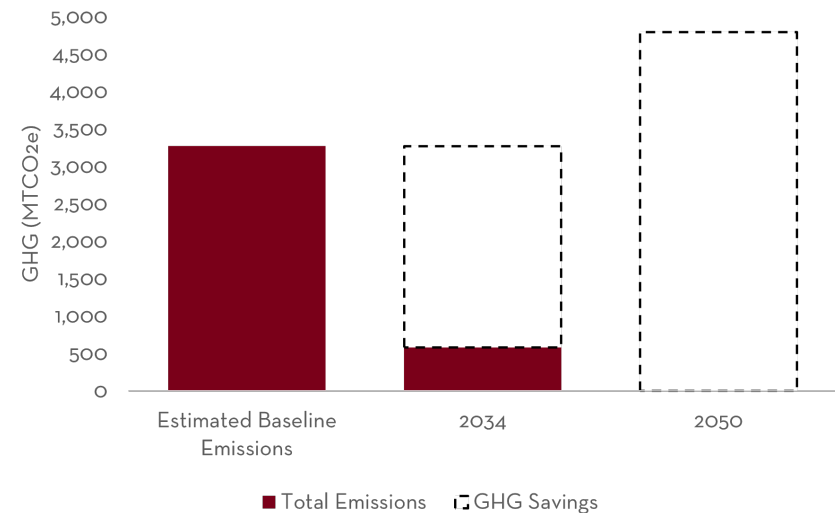


Figure 5: Projected campus emissions over time. The estimated GHG savings in 2050 assumes the Boldest enrollment goal is achieved, and the campus has expanded accordingly. The near-term target corresponds to the near-term planning horizon of the Campus Plan.

Near Term (2024-2034)

During this decade, inventoried GHG emissions will be reduced from 3,270 MTCO₂e to 582 MTCO₂e.

Building Emissions Mitigation

As illustrated in Figure 4 on the preceding page, a large majority of current emissions are due to electricity consumption. Rochester Public Utilities (RPU) has committed to supply 100% emissions free electricity by 2030. This will reduce building-related emissions in the near-term by 85%.

The leases for University Square, Residence at Discovery Square, and 318 Commons end in 2032. In order to eliminate building heating, cooling, and electric emissions from these spaces, UMR will need to negotiate a transition to electric HVAC systems (e.g. through green lease agreements); or, move to other carbon neutral facilities. When the City's TEN is established, UMR will prioritize buildings that are connected, or will be connected. UMR will also work with landlords to minimize energy demand to ensure environmental and fiscal sustainability into the future. UMR's expected decrease in energy use within University Square and 318 Commons due to electrification and efficiency upgrades supported by green leases ranges from 10% to 30%.¹⁸ In the near-term, reduction in building-related near-term greenhouse gas emissions across the portfolio of buildings amounts to 7%. This assumes the use of the baseline (i.e. projected 2024) grid emission factor. If the projected 2032 electricity grid emissions factor is used (i.e. RPU reduces emissions to 0 lbs. CO₂e/kwh), the result is a 24% reduction in building-related greenhouse gas emissions across the building portfolio. Neither of these values include the effects of the connection to the thermal

¹⁸ These numbers are based on the GSF of spaces currently in University Square, 318 Commons, and Residence at Discovery Sq. and assumes UMR has shifted to all-electric spaces, either within the existing buildings, or within new buildings.

energy network. Connecting University Square, 318 Commons, and Residence at Discovery Square, or spaces that take their place, to the future TEN combined with RPU meeting its 2030 commitment would fully electrify building HVAC systems, making them net-zero carbon.¹⁹

Commuter Emissions Mitigation

To address emissions related to commuting in the near-term, UMR will work with the City of Rochester and DMC to make sustainable commuting the easy choice. Additionally, UMR will promote sustainable options through communications and programming such as trip planning support, electric vehicle education and coaching, electric vehicle charging access, and carpool matching. By implementing these strategies, UMR is estimating that 50% of UMR employees and 60% of student commuting trips will be by a sustainable mode (bicycle, walking, and carpool) and that 10% of employees and 5% of students will commute by electric vehicle. Carbon

¹⁹ This assumes that the future TEN supplemental heating is electric based and that all current building natural gas consumption is used for heating. If building natural gas is used for purposes other than heating, those would need to be electrified as well.

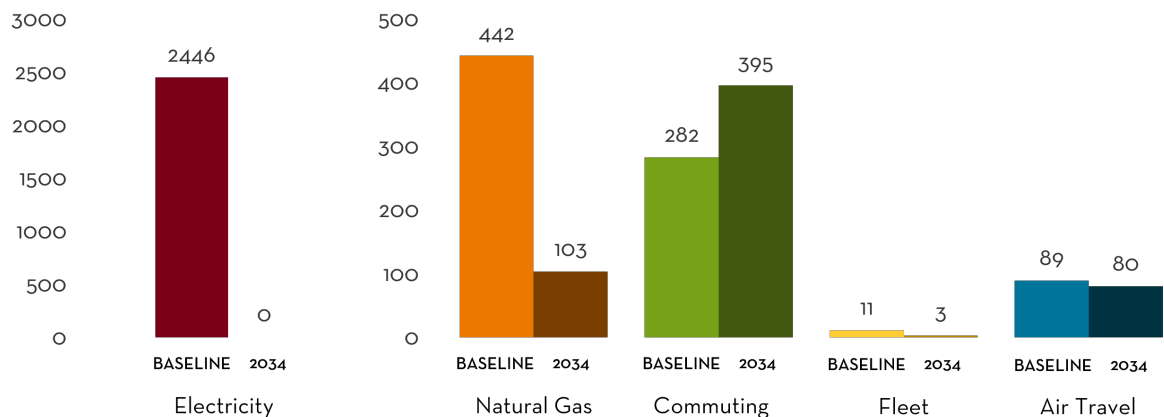


Figure 6: Change in emissions (MTCO₂e) from electricity in the near-term

Figure 7: Change in emissions (MTCO₂e) from other sources in the near-term

emissions in the near-term will depend upon the ability of UMR and partners to achieve these targets and possible enrollment growth. For the purposes of the CAP, commuting emissions are estimated to grow by 40% under the Boldest enrollment growth even when meeting the ambitious mode shift targets.

Fleet Emissions Mitigation

UMR will establish and deploy a fleet charging plan to support electrification of its fleet to battery electric (BEV) and plug-in hybrid vehicles (PHEV). Take-home vehicles policies and driver education will also support this transition. Fleet emissions are expected to decrease more than 70%-100% depending upon vehicles purchased.

Air Travel Emissions Mitigation

UMR will promote more sustainable modes of transportation and other carbon-reducing travel strategies when possible, and procure quality carbon offsets. The illustrations in the plan depict a 10% decrease in air travel emissions.

Long Term (2034-2050)

During this time period, inventoried GHG emissions will be reduced from 582 MTCO_{2e} to zero.

Building Emissions Mitigation

The lease agreements for the Student Life Center, One Discovery Square, and Two Discovery Square will expire in 2049 or before without extensions. The University will negotiate green leases in these buildings, and/or move to occupy space in zero carbon facilities. If the City's TEN is established, UMR will prioritize occupying buildings that are connected or will connect to it. When building in the Education District, all new construction will be designed to be net zero operating carbon, accelerating B3 Guidelines and using the SB 2030 Energy Standard for documenting carbon requirements. In addition to meeting B3 Guidelines and SB2030, additional standards that align with UMR's health focus, such as the WELL Building Standards, could be applied.

Commute Emissions Mitigation

By 2050, all commuters will take a sustainable form of transit or drive an electric vehicle. This will require continued support and education from transitioning away from fossil fuel powered vehicles. If these targets are not achieved, UMR will consider alternatives, such as carbon offsets.

Fleet Emissions Mitigation

As the statewide network of electric vehicle chargers is built out, UMR will transition the entire fleet to battery electric vehicles.

Air Travel Emissions Mitigation

UMR will promote more sustainable modes of transit and other carbon-reducing travel strategies, virtual meetings when possible, and procure quality carbon offsets. In the long-term, sustainable aviation fuel (SAF) and other technologies may be more available and flights utilizing SAF will be preferred.

Carbon Offsets

Carbon offsets are financial instruments that assign the value of carbon mitigation to the purchaser from activity undertaken by the seller. There are many types and tiers of offsets, including ones generated in-state. While offsets have value for Scope 1, 2, and 3 GHG emissions, universities most commonly purchase carbon offsets to counter the emissions caused by air travel.

The University of Minnesota prioritizes direct emissions reduction over use of carbon offsets. The University will convene a working group to make recommendations on the attributes and appropriate use of offsets in reaching its emissions goals, particularly to address near-term air travel emissions. The carbon offset program will be mission-aligned.

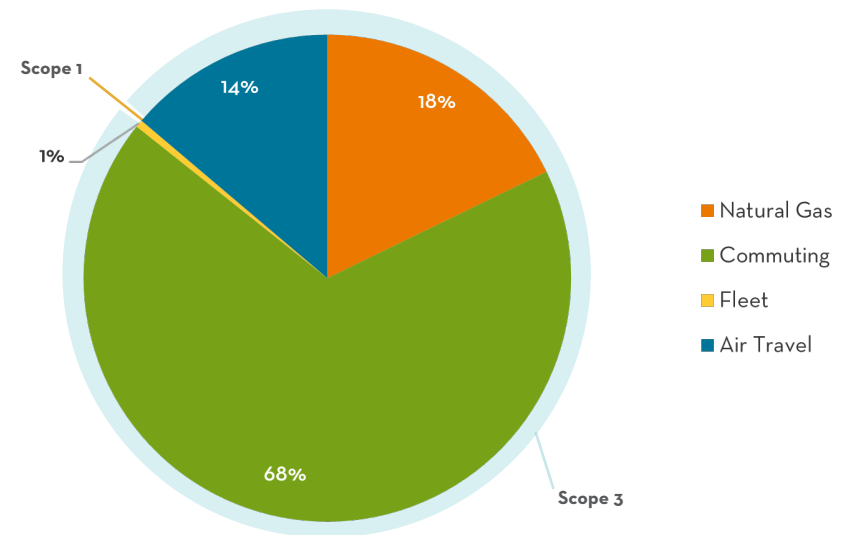


Figure 8: UMR estimated GHG emissions in 2034.

Utilities and Energy District Opportunities

Future Electricity Emissions Reductions

A large portion of the GHG emissions currently inventoried by UMR are assigned to electricity use in buildings where UMR leases space. RPU owns a small number of power generating assets but purchases almost all of its power (99%) through a wholesale supplier, Southern Minnesota Municipal Power Agency (SMMPA), whose primary power generating assets are coal and natural gas. The result is a carbon intensive electricity supply for RPU. In 2022, the emissions from 1 kWh of electricity from RPU were 3.6x more than burning an equivalent amount of natural gas.²⁰

By 2030, RPU intends to purchase 100% carbon free power, positioning it to be compliant with the State of Minnesota's requirement (Senate File 4, 2023) that all utilities serving the state supply 100% carbon free electricity by 2040. When RPU achieves its commitment to 100% carbon free electricity in 2030, UMR will realize a 85% reduction in building-related greenhouse gas emissions relative to the baseline.

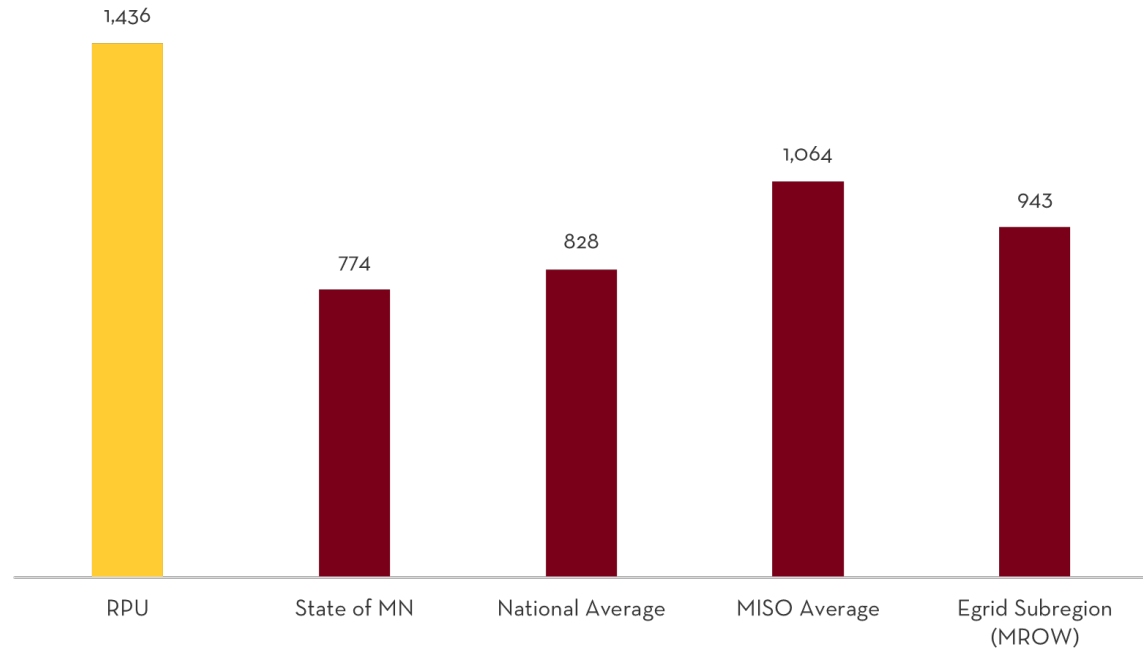


Figure 11: RPU 2022 electricity supply carbon intensity vs other regions.

Data from the U.S. EPA Egrid Data Explorer tool.

MISO is the Midcontinent Independent System Operator or the multi-state power grid that includes Minnesota. Egrid is the Emissions and Generation Resource Integrated Database or a comprehensive inventory of the environmental attributes of electric power systems from EPA and the subregion for Minnesota is the Midwest Reliability Organization - West (MROW).

²⁰ <https://www.epa.gov/egrid/data-explorer>

Rochester's Thermal Energy Network

The City's planned TEN, a geothermal-based district energy system for heating and cooling buildings, will enable connected buildings in downtown Rochester to eliminate use of natural gas for heating by shifting to efficient electric sources. The future TEN uses large underground pipes for distributing water at ambient temperature in a loop that connects buildings. Heat pumps and heat exchangers at each connected building use the water as a source or sink for thermal energy, allowing exchange of energy among buildings connected to the loop. Thermal energy can be provided by a number of different thermal assets including, geothermal wells (sometimes referred to as geo-exchange), thermal energy storage, river water heat extraction/rejection, supplemental heating (i.e. backup boilers, central heat pumps) and supplemental cooling (i.e. cooling towers, heat pumps, chillers). The outcome is a highly efficient system that provides heating and cooling via electrically driven technologies that are commercially available and can be powered with renewable energy sources.

The plans for Rochester's future TEN include service to much of downtown Rochester, including privately-owned buildings such as those occupied by UMR. The TEN's first phase currently serves Government Center. An expansion is planned to serve other government buildings, like the Mayo Civic Center and the Rochester Public Library. The City, with support from DMC, is working to develop plans to expand TEN service from government buildings to commercial properties. Part of that process is to establish the system's operational and ownership structures and to stimulate broad interest by downtown landowners to connect to the system.

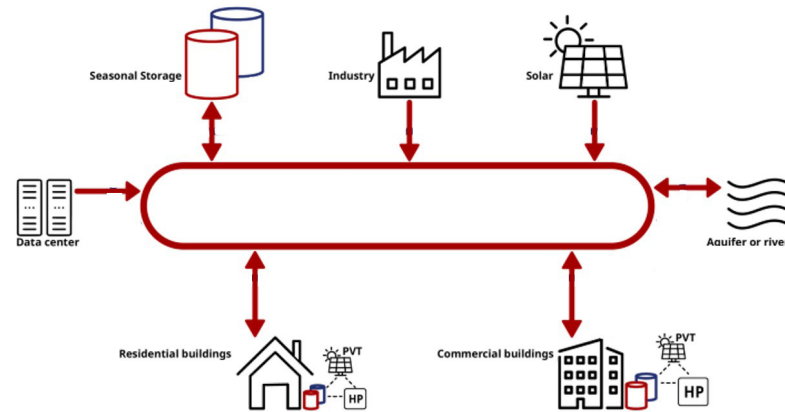
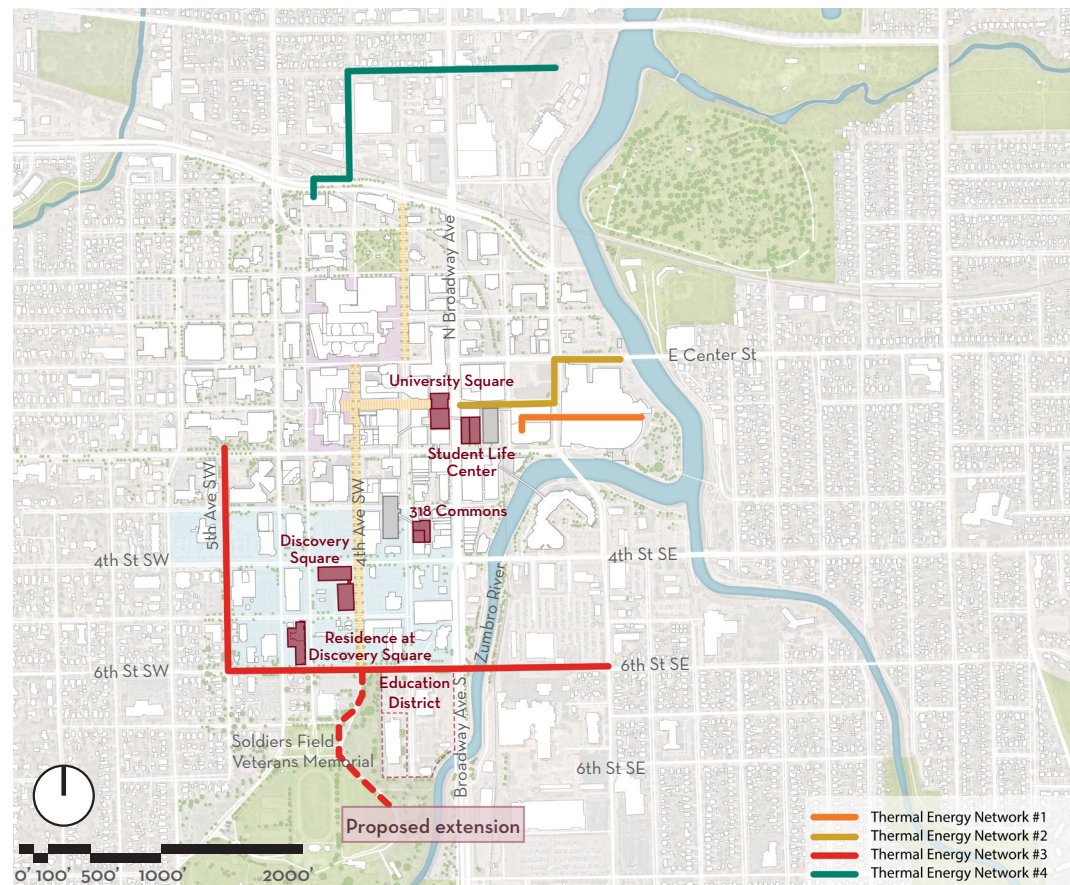


Figure 12: Illustration of an ambient district loop.

Figure 13: Illustration of City of Rochester's planned Thermal Energy Network by project phase.

Source: City of Rochester



UMR can undertake sustainability efforts that motivate behavior change. A typical behavioral change goal in higher education is to reduce building energy demand by up to 5%. Studies suggest that behavioral change initiatives that come closest to realizing and sustaining the 5% energy reduction goal are those for which the subject community are science and math-oriented students and professionals. Key elements of these initiatives are social and financial incentives (motivation) for changed behavior, regular communication about the program and its progress, transparency of data (systems that regularly measure and verify progress) and staff (volunteer and/or paid) to guide the process and serve as information resources.

Leasing Strategies to Reduce Building GHG Emissions

To realize GHG emissions reduction goals, UMR will need to occupy buildings that are fully dependent on renewable energy. With RPU's goals to decarbonize by 2030, this could include buildings that are all-electric, and buildings that are connected or have the potential to connect to the City's future TEN. Energy efficiency measures focused on reducing natural gas usage will also lead to reduced emissions. Given this, lease expirations represent an opportunity for the University to prioritize highly energy efficient and/or all electric buildings.

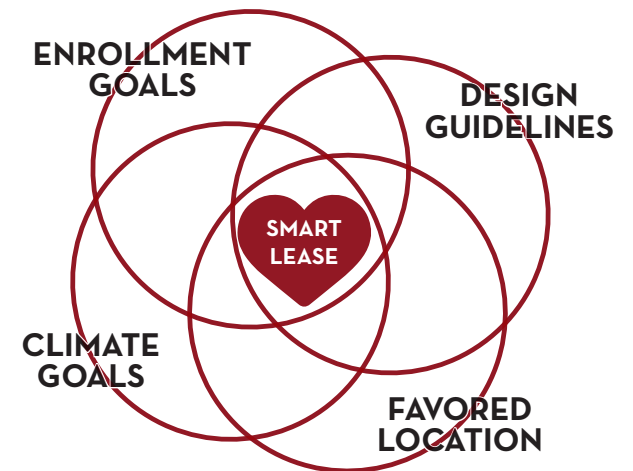
Future Leased Space

Leases for space occupied by UMR are negotiated, executed and administered by the University's Real Estate Office in close consultation with UMR leadership and operations staff. The Smart Leasing approach laid out in the Campus Plan is a principle-based decision-making tool for the University's Real Estate Office to consider multiple priorities and evaluate new leases to achieve the best outcome. One of those priorities is climate action.

One real estate industry tool to negotiate climate action goals into leasing agreements is called a green lease. Green leases (also called high-performance leases, or energy-efficient leases) are rental agreements in which tenants and landlords work together to achieve energy efficiency, add on-site renewable energy, and achieve other agreed-upon sustainability goals. When specific to energy, this type of lease agreement would require the University to negotiate with landlords who are amenable to achieving and tracking certain building and energy performance targets during the course of the lease. The University will develop green lease provisions by adapting industry norms and best-practices to apply to UMR's specific needs and partner negotiations to establish certainty of obligations and opportunities for all parties.²¹ The following is a list of key considerations that could be included in green lease arrangements:

- Performance-based targets for energy efficiency and carbon reduction.
- With lessors, co-develop pathways to decarbonization, including connecting to the City's future TEN.

²¹ Sources: Green Leasing: Landlord and Tenant Perspectives (Kramer Eric and Nicholas, Carmela - Pillsbury Perspectives on Real Estate Newsletter- Spring 2012). Retail Industry Leasing Association - Retail Green Lease Primer (2013).



- Include clauses that detail ongoing collaboration, such as:
 - Energy audits
 - Retrocommissioning
 - Submetering
 - Utility data sharing

The University is most likely to establish green leases where the building owner is motivated to do so and UMR occupies a substantial proportion of the building. UMR is the primary tenant at University Square, the Student Life Center, and 318 Commons. Should these leases only address energy use reduction, it offers the University the opportunity to reduce its payments (direct and indirect) for utilities and reduce building GHG emission rates. Separate from considering the transition of the local energy supply to renewable sources, it can be assumed that green leases that are exclusively focused on energy use reduction in these buildings will reduce energy use by 10 to 30%. Should these buildings be served by the future TEN, the building's energy use and GHG emissions would be reduced by 20%-50% and 20%-100%, respectively.

For more information on green leases, see Appendix C.

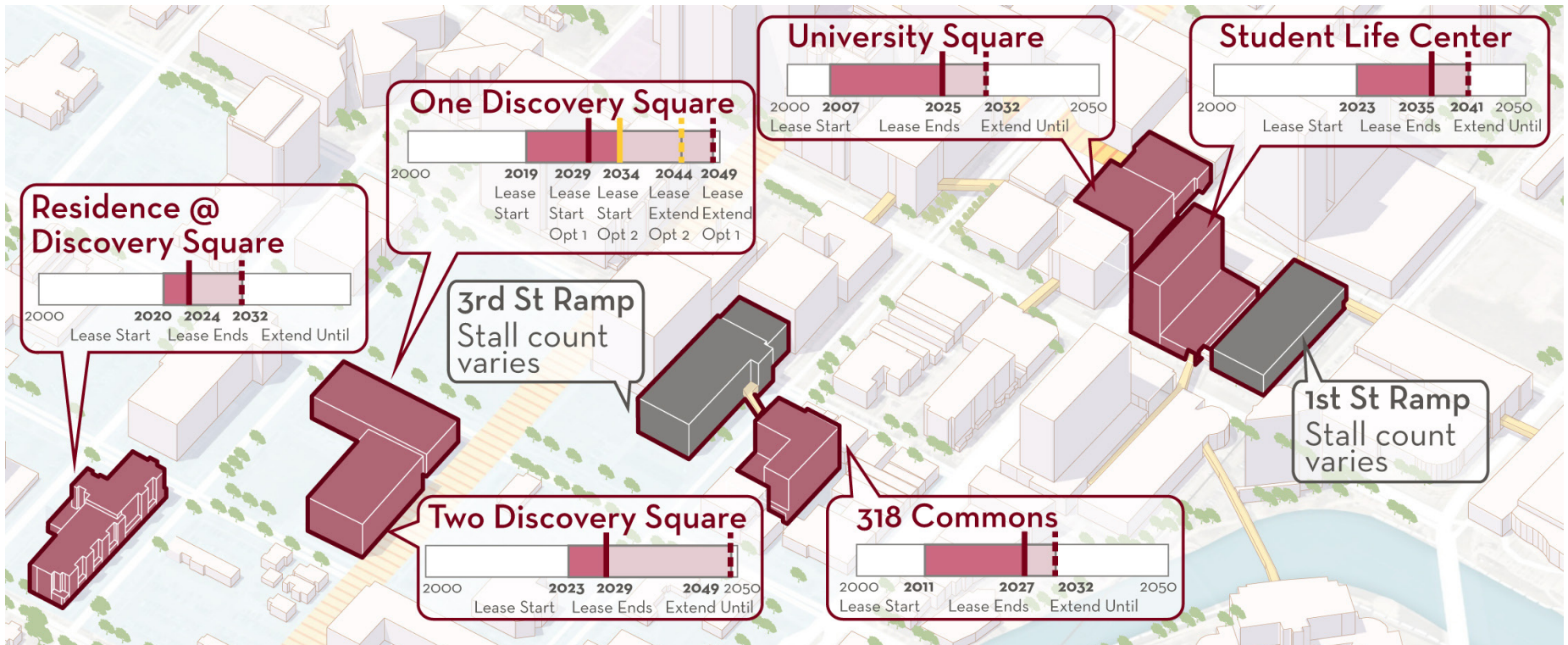


Figure 14: Leasing timelines for UMR.

The Education District Opportunity

As UMR's enrollment grows, the Campus Plan anticipates new construction in the Education District. These buildings, regardless of ownership by the University or a private party, would meet the Minnesota Buildings, Benchmarks, and Beyond (B3) Guidelines and the Sustainable Building 2030 (SB 2030) Energy Standard. The B3 Guidelines set sustainability goals for site, water, energy, indoor air quality, materials and waste. The SB 2030 Energy Standard varies depending upon the year of construction and increases the level of decarbonization over time. New construction in the Education District would meet the final SB 2030 requirements regardless of the time constructed by meeting zero carbon standards. New construction in the Education District will be designed as a highly energy efficient building with renewable energy systems on site, such as solar photovoltaic and a connection to the City's future TEN.

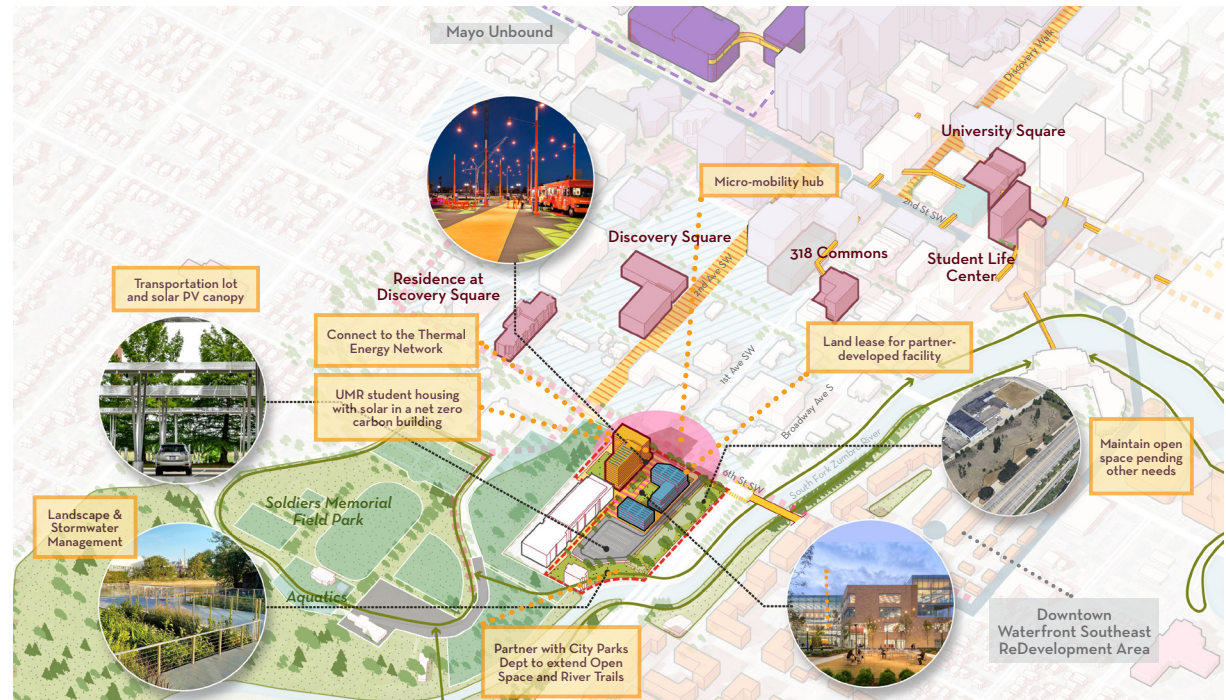


Figure 15: Education District Opportunities

Commuting Emissions

Engagement data from the CAP planning process estimates that UMR’s commuting-related GHG emissions is approximately 9% of the total emissions. At current commuting mode splits, projected enrollment growth will significantly increase UMR’s emissions from commuting. To combat this, UMR will focus on shifting commuters from fossil fuel powered or internal combustion engines (ICE) and single-occupancy vehicles (SOV) to more sustainable options. Even when meeting mode shift targets presented below, emissions from commuting will remain relatively constant or increase over the near-term as a result of enrollment growth.

In alignment with the City of Rochester’s and DMC’s goals to reduce SOV trips to downtown by 50%, UMR has set the following targets for employees and students. The mode shift opportunities targets account for the current difference in commuting patterns between employees and students. Currently, employees account for approximately 10% of the UMR population and 40% of emissions because a greater number of employees commute in an ICE-SOV. The estimates and targets represent the breakdown of trips taken and do not account for hybrid work and learning and on campus housing, which are accounted for when calculating emissions. Rates for hybrid work and learning and on campus housing are assumed to remain constant into the future and should continue to be supported through the University’s “Work. With Flexibility.” program, technology support, and space growth in alignment with the Campus Plan.

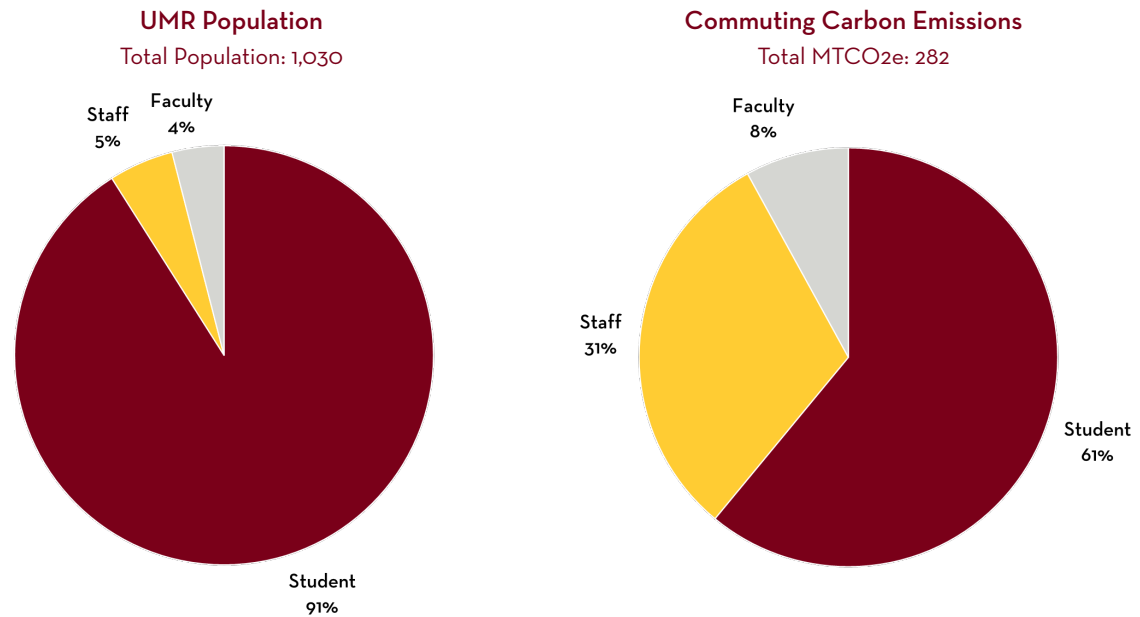


Figure 16: Comparison of UMR Population and Emissions (FY24 / Fall 2023). Currently, employees account for approximately 10% of the UMR population and 40% of emissions.

Employees ¹		2023 Mode Split Estimates	2034 Mode Split Targets
SOV	ICE	68%	40%
	EV	0%	10%
Walk, bike, transit, carpool		32%	50%

Students		2023 Mode Split Estimates	2034 Mode Split Targets
SOV	ICE	56%	35%
	EV	0%	5%
Walk, bike, transit, carpool		44%	60%

¹ Faculty are much closer to the 2034 target compared to staff (56% of faculty currently commute by car), which demonstrates the potential for mode shift and possible need for dedicated strategies by role.

Partners Make it Possible

To meet the 2034 mode split targets, UMR will work with the City of Rochester and DMC to make sustainable commuting the easy choice. The City and DMC plan to continue expanding dedicated bike lanes, bus rapid transit (LinkBRT), electric vehicle charging, electric vehicle carsharing, and other micro-mobility improvements.

UMR can support these measures by promoting these alternatives and their co-benefits - cost savings and the health benefits of walking and bicycling among them. UMR can support its community of employees and students with communications and programs such as trip planning support, electric vehicle education and coaching, and carpool matching. Additional strategies to promote mode shift include infrastructure upgrades, such as creating a mobility hub in the Education District, increasing access to bike amenities (i.e. racks/parking, showers, etc.), and utilizing partnerships to provide electric vehicle charging in leased or future owned transportation lots. Lastly, UMR will encourage students and employees to live downtown by advocating for affordable housing options downtown and exploring creative partnerships and programming to support off-campus housing within the public transit network.

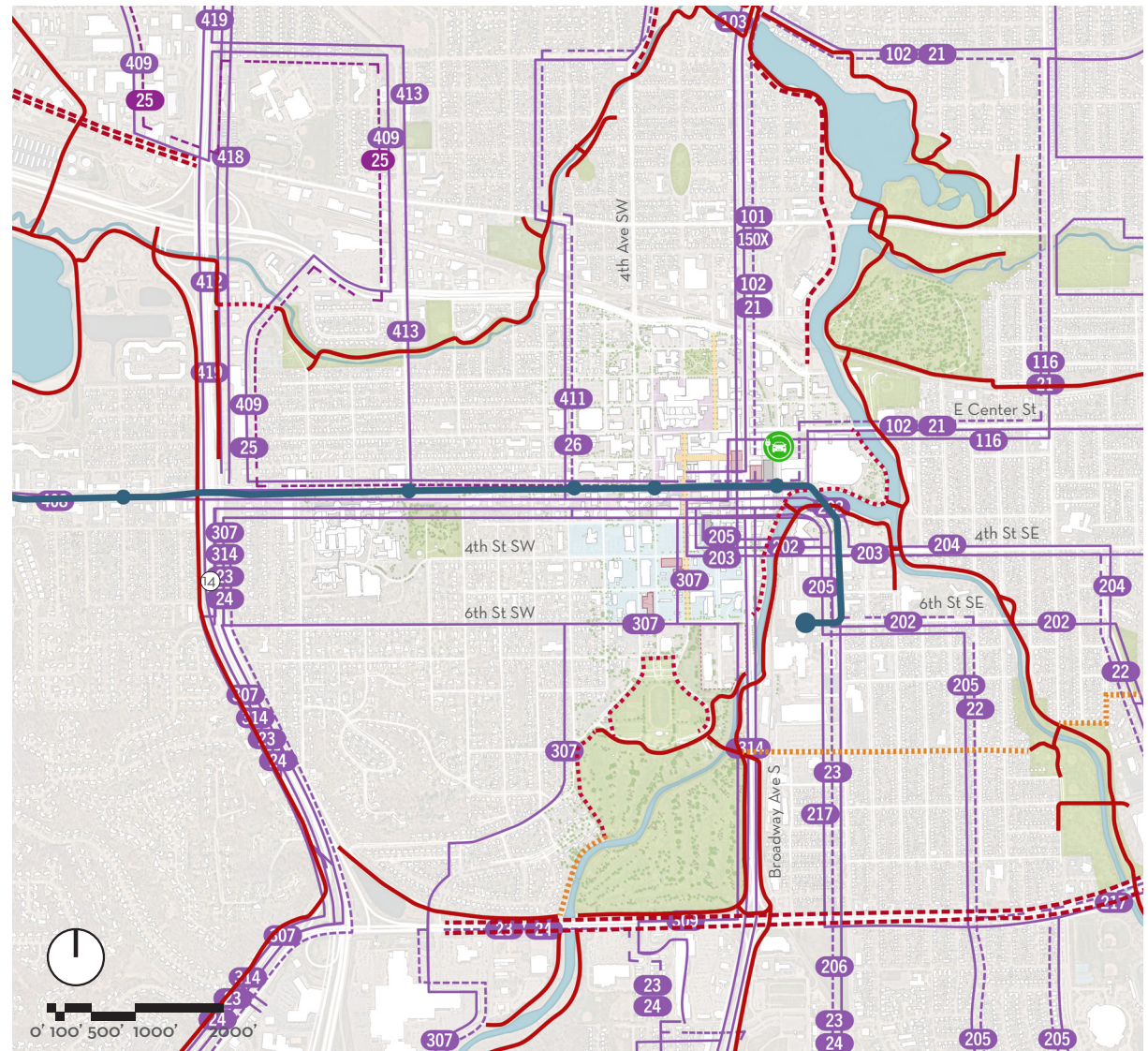


Figure 17: Proposed BRT expansion expected 2026, existing bicycle map, existing bus routes

- Off Street Bike Paved Trails
- - - On Street Bicycle Lanes
- Bicycle Routes
- Pedestrian Pathways (bicycles allowed, except where signed)
- Existing Bus Routes
- Proposed BRT expansion
- EV Charging Stations

University Fleet Vehicles

The University of Minnesota's centralized fleet management team leases vehicles to UMR. The UMR fleet consists of two vehicles that are used for regional recruiters and two that are primarily used for campus operations and campus sponsored student recreation. The recruiter vehicles are regularly used for trips that currently exceed the range that a battery-electric vehicle (BEV) may travel on a single charge. Plug-in hybrid electric vehicles (PHEV) may provide additional assurances for recruitment vehicles until an efficient charging network across the state is built. Policy changes and updates will be needed for take-home vehicles. The two campus operational vehicles are candidates for transitioning to BEV given the current uses. Only a few additional vehicles may be needed to support projected growth of campus and the least carbon-intensive vehicle for the intended use will be considered. All UMR fleet vehicles will be a PHEV or a BEV by 2034 and all will be BEV by 2050.

Dedicated fleet charging space would be desirable. Several permutations of owned and leased assets to support charging can be explored for both surface lots next to leased buildings and in parking ramps. The thirteen publicly available electric vehicle charging stations in and around Rochester may be options in the short-term.

University-Sponsored Travel

University-sponsored travel accounts for 3% of UMR's baseline emissions. UMR has limited University-sponsored air travel data and will improve records of sponsored air and ground travel.

The University system is working on strategies to reduce associated emissions by:

- Procuring carbon-free or sustainable transportation modes,
- Increasing utilization of carbon-reducing travel strategies, and;
- Developing a program for purchasing high quality carbon offsets with co-benefits linked to the type of travel carbon offsets.

In the near-term, travelers can use the University's travel registration system to see the carbon impact of their flight today and pick a lower emissions flight, such as purchasing a direct flight. Other sustainable travel modes (i.e. trains) may be possible depending upon the location of travel. In the long-term as airlines transition to sustainable aviation fuels (SAF), flights from airlines adopting and utilizing this technology will be prioritized. A Greater MSP-led coalition of partners with the State of Minnesota launched the first large-scale SAF hub in the Midwest in Minneapolis in 2023, stating, "SAF can reduce the lifecycle carbon emissions of flying by more than 80 percent."²² Multiple University of Minnesota researchers are also advancing this important work.

²² <https://www.greatermmsp.org/pages/saf/>



MINNESOTA

WIS

SOUTH DAKOTA



Climate and Community Adaptation **3**

Climate Adaptation

The University of Minnesota Climate Adaptation Partnership (MCAP)²³ models climate change based upon different Representative Concentration Pathways (RCP) or GHG emission scenarios. The moderate scenario (RCP 4.5) estimates an emissions peak around 2040 and then decline. The highest baseline scenario (RCP 8.5) models a continual rise in emissions throughout the twenty-first century.²⁴

The following climate projections are for Olmsted County for the moderate and highest global emissions scenarios for mid-century:

- The days per year with precipitation over 1" will increase from 6 to 7 days by mid-century. The amount of summer precipitation is not projected to change.
- The coldest nights, those below 0° F, will shift from the historic rate of 25 per year to 15 per year.
- The hottest days, those above 90° F, will shift from the historic rate of 10 days per year to between 25 to 30 per year.
- The change in annual maximum temperature will rise by 5° F to 6° F

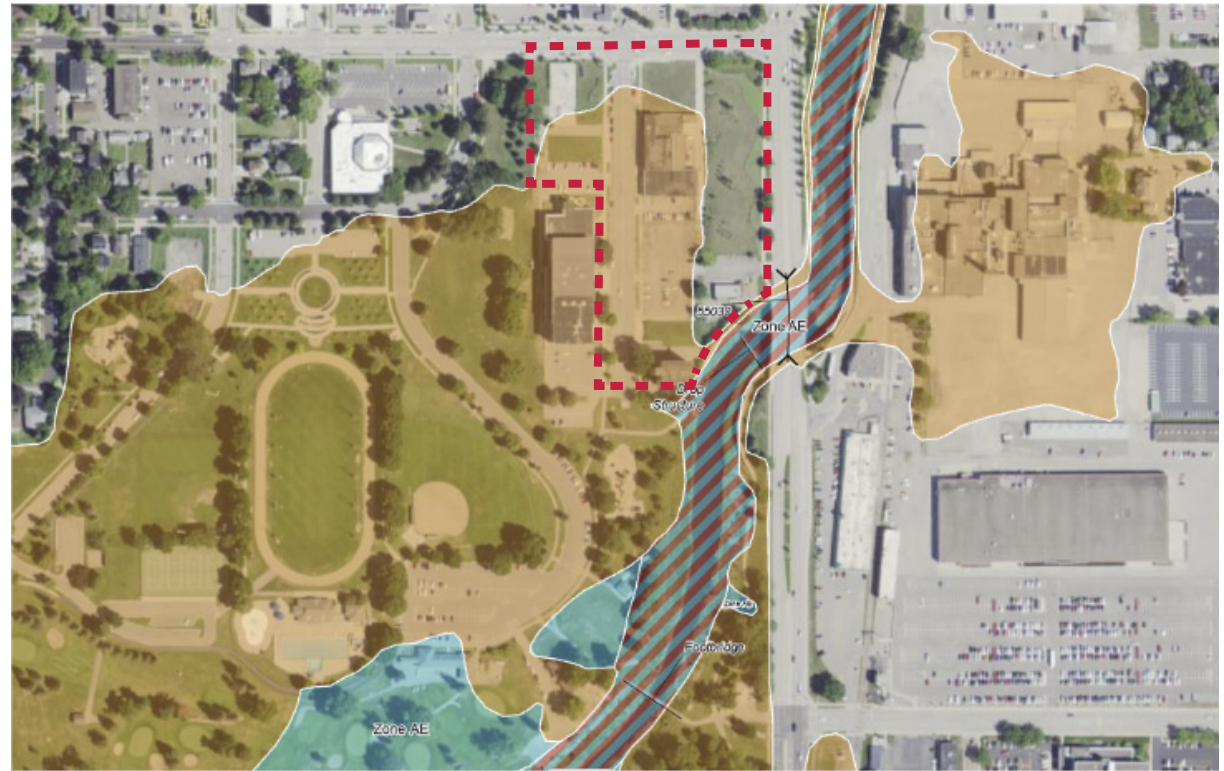


Figure 18: FEMA map showing 500-year flood zone overlay on UMR Education District. A portion of UMR's Education District is currently at risk of flooding during a 500-year flood event. Any buildings in this area in the future should be designed to a base flood elevation

- ■ ■ UMR Education District
- Zone AE, 1-percent-annual-chance Flood Hazard Area
- Zone X, 0.2-percent-annual-chance Flood Hazard Area
- ■ ■ Area with Reduced Flood Risk due to Levee

23 <https://climate.umn.edu/climate-data>

24 <https://cal-adapt.org/help/faqs/which-rcp-scenarios-should-i-use-in-my-analysis/>

Campus and Community Resilience

The City of Rochester's Sustainability and Resiliency Community Work Plan (2021)²⁵ recognizes that climate change is accelerating habitat loss, increasing pollution, and allowing for the growth of invasive species. Rochester has identified flood-prone areas of the city as being at accelerated risk due to climate change. The plan calls for a detailed community vulnerability assessment to better protect properties in this area and to work to design more resilient buildings in the future.

In alignment with the City of Rochester's Sustainability and Resilience Community Work Plan and climate change impacts to Minnesota and Olmsted County, UMR will advance the following efforts to build resilience on campus and in the campus community, as described in the Campus Plan:

Community

- Focus UMR field teaching (outreach) activities on projects with benefits to environmental justice neighborhoods and communities.
- Develop an equitable food access plan.
- Partner to ensure the entire UMR campus community has adequate access to physical and mental health care.
- Incorporate climate resilience into the Culture of Safety Plan.
- Regularly provide the UMR community with guidance about how to stay safe during extreme weather events.

Environmental

- Reduce water consumption on campus.
- Take action to reduce the volume of waste generation on campus, and establish a three-stream waste management system.

Infrastructure

- Create design guidelines for buildings, infrastructure, and land that incorporate future climate projections, improvements for well-being, and redundancies for critical operations.
- Partner with the city and other partners to advocate and plan for effective public transportation options that provide safe and cost-effective ways to commute and get around.
- Align with the City of Rochester's Emergency Management Plans.



²⁵ <https://www.rochestermn.gov/home/showpublisheddocument/33148/637786236803030000>





Implementation Support 4

Partnering to Realize Carbon Neutrality

UMR's commitment to partnerships is well established. Through adoption of the CAP, UMR will build upon this collaborative history to actively work towards meeting shared sustainability and climate action goals. For reference, GHG emission reduction goals have been established by the following partners:

- **City:** 100% by 2050; 50% by 2030
- **DMC:** 80% by 2050
- **Mayo:** 50% by 2032
- **RPU:** 100% by 2030 (electric utility)

UMR will actively contribute to the vibrant partnership ecosystem by continuing to:

- Participate in civic plan development and policy making.
- Incorporate the health effects of climate change into curriculum and encourage students to be active members of the Rochester community.
- Advance shared GHG reduction goals through real estate decisions by locating in buildings connected to the City's future TEN, establishing Smart Leases, and building sustainably in the Education District upon enrollment growth.
- Educate and support students and employees shifting from single occupancy vehicles to biking, walking, and transit by advocating for and raising awareness of new and existing mobility opportunities in alignment with the City of Rochester and DMC's transportation goals.
- Work with the City and other parking providers to develop dedicated or shared electric vehicle chargers for commuters, student residents, and the University fleet.
- Establish a three-stream waste management system and partner with Olmsted County on its ongoing initiatives.
- Engage in implementation of the City of Rochester's Sustainability and Resilience Work Plan.

DMC Partnership Opportunities

CLIMATE ACTION

Facilitate City Thermal Energy Network (TEN) rollout, green leasing, and community support for RPU's decarbonization. Develop funding models and analytical tools for decision making that incorporates:

- clear pathways to decarbonization through partnerships;
- the cost and support for equipment and building system upgrades; and
- opportunities related to the Inflation Reduction Act.

Participate in capital project funding for City distribution and renewable grid infrastructure.

Support shared sustainable mobility goals.

- Advance DMC's goal of 50% fewer non-vehicular downtown commutes
- Continue to support electric vehicle charging network in the downtown and in City ramps.
- Coordinate UMR opportunities with LinkBRT improvements
- Expand implementation of micro-mobility/sharing, bike amenities, covered public parking in centralized location, etc.

FACILITY NEEDS

Identify shared needs for childcare among downtown partners.

- Locate in the Education District via land-lease or in Heart of the City
- Explore potential curriculum and practicum tie-in with UMR and other higher-ed partners

Facilitate multi-constituent indoor recreation facility located downtown to accommodate a variety of recreational and social activities.

Encourage skyway and/or subway extensions, consistent with City plans.

- To One Discovery Square from the existing Mayo / Guggenheim subway
- Others such as across Broadway between 3rd and 4th Streets

Develop comprehensive wayfinding signage in Heart of the City and throughout Downtown.

Facilitate development of shared-use special-purpose learning and assessment environments.

UMR Students and Campus Culture of Sustainability

UMR has embedded aspects of climate action and resilience into the curriculum and programming. For example:

- UMR's Integrated 4 + 1 Master of Public Health in Environmental Health is a collaboration of UMR and the School of Public Health. Its intention is to attract students with passion to investigate health hazards in the environment and the opportunities for public health policy to address these risks.
- UMR's EcoliteracySCHOOL (Students Collaborating in Health-Oriented Outdoor Learning) is a public health and environmental leadership program that brings college students together in mentorship with high school students interested in biology and health science. Students experience shared environmentally focused curriculum, guided mentorship engagement and in-person immersive field experiences.
- UMR's Capstone offering is proven to be an invaluable opportunity for students to study the relationships of public policy and global health.
- UMR's Sustainable Living Learning Community is where students with a shared passion for sustainability can connect with each other and with faculty and staff, including accessing academic support to craft individualized means of integrating sustainability into their academic experiences.



The University of Minnesota Climate Adaptation Partnership (MCAP) is a multi-sector, statewide group that leverages academic research to advance climate adaptation and capacity-building. Created in 2008, the mission of the partnership is to “support thriving communities and landscapes through collaboration, capacity building and advancing climate-informed decision-making.”^{1a} The partnership is supported by the University of Minnesota Extension and the College of Food Agricultural and Natural Resource Sciences. MCAP projects address a range of topics, such as explaining atmospheric river hazards, supporting mental health professionals in addressing climate change impacts, launching a climate-smart agricultural extension program, and a variety of specific applications of climate modeling. MCAP offers other scientists, academics, and the public a number of tools and resources to advance their knowledge and educational impact at the state and local level.

Case Study: Experiential Education

UMR Senior Lecturer Jessie Barnett Schimek and her colleagues inspire students to solve complex health issues. She and her co-authors^{2a} describe the many campus pathways for undergraduate health science students to explore the relationship of environmental health and justice, the social determinants of health, and health inequalities. Faculty cultivate experiential learning through student-led research and community engagement, fostering self-discovery and passion for future career paths.

The experiences reveal that the students' experiential learning activities include an aspect of self-discovery that fuels the students' passions towards their career paths. Cassie Kersten ('16): “My Capstone experience taught me the importance of contextualizing science and always keeping the bigger picture in mind. It is important to be able to communicate the goals and results of your project in order to make the desired change. This is especially important to remember in public health, where much of the research can make a major impact.” Cassie continued her UMR education at Emory University, earning a Master of Public Health in Global Epidemiology and now works in crisis management consulting to improve preparedness for emergencies, including those caused or worsened by climate change.

^{1a} <https://climate.umn.edu/our-mission>

^{2a} Osecki, Kristin, Barnett, Jessie, Majia, Angie. “Creating an Integrated Undergraduate Public Health Curricula: Inspiring the Next Generation to Solve Complex Public Health Issues” *Front Public Health*. 2022 Apr 18;10:864891. doi: 10.3389/fpubh.2022.864891. eCollection 2022

Plan Financing and Funding

Funding to accomplish the goals of the CAP will be a blend of familiar resources and innovative financing means. Achieving some of the goals in the CAP requires coordination and reciprocal effort by UMR partners. Because of this, both the Campus Plan and the CAP emphasize capacity-building with downtown partners who share climate action goals. For example, UMR will need to work with lessors who are interested in investing in decarbonization efforts. Additionally, the City and DMC can play a role in creating educational programming or hosting a local support network for building owners and developers to understand federal and state tax incentives for decarbonization efforts.

For actions within UMR's direct financial control, grants, alignment of internal resources and procurement processes, and seeking other external resources will help move initiatives forward. Strategies to fund climate action that are in development or use by the University include the following,

- Create and revise financial tools, resources, and processes to enable the objectives identified in the CAP.
- Identify and pursue grants and incentives aligned with objectives.
- Create a task force to make recommendations on the use and value of a carbon price.
- Increase capacity, tools, and support to implement strategies.
- Pursue Inflation Reduction Act tax credits and deductions.

The University's Board of Regents Policy Sustainability and Energy Efficiency commits the University to use a life-cycle cost approach to assess total cost of ownership (TCO) for decision making, which will also be important in evaluating lease opportunities and for new construction in the Education District. An informed total cost of ownership recognizes upfront and ongoing costs, return on investment, and the impact that choices have on future avoided costs and impacts of climate change.

Internal Capacity

Sustainability and climate action are integral to the UMN mission. All members of the UMR community play an important role in advancing sustainability and climate action in their work and studies. To advance strategies in the Campus and Climate Action Plans, professionals from real estate, facilities management, administration, and more will be involved. In addition, UMR does not currently have an employee position dedicated to sustainability given the current size of the campus. In the near-term, student positions and AmeriCorps positions such as ClimateCorps and GreenCorps may help to increase capacity. In the long-term, UMR will consider adding additional employee capacity to support the implementation of the CAP as the campus grows.

Plan Implementation

With adoption of the CAP, UMR in collaboration with UMN's Systemwide Office of Sustainability, will establish a working group of faculty, staff, and students who will be tasked with creating a work plan to implement the recommendations of this document, carefully pairing initiatives to key performance indicators. Whether executed within the working group or as a partner to it, UMR will dedicate attention of its leadership to the critical issue of funding and financing capital and operational investments as needed to satisfy the work plan.

The University of Minnesota Climate Adaptation Partnership (MCAP) is a multi-sector, statewide group that leverages academic research to advance climate adaptation and capacity-building. Created in 2008, the mission of the partnership is to "support thriving communities and landscapes through collaboration, capacity building and advancing climate-informed decision-making."^{1a} The partnership is supported by the University of Minnesota Extension and the College of Food Agricultural and Natural Resource Sciences. MCAP projects address a range of topics, such as explaining atmospheric river hazards, supporting mental health professionals in addressing climate change impacts, launching a climate-smart agricultural extension program, and a variety of specific applications of climate modeling. MCAP offers other scientists, academics, and the public a number of tools and resources to advance their knowledge and educational impact at the state and local level.

^{1a}

<https://climate.umn.edu/our-mission>





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university
square

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Acknowledgements 5

Acknowledgments

This Campus and Climate Action Plan benefited from broad engagement with the UMR community of students, faculty, staff, and UMR's many partners. Thank you to UMR leadership for sharing invaluable data and guidance to shape the Plan. Thank you especially to Chancellor Carrell for convening UMR's community partners to participate in the planning process.

Chancellor

Lori J. Carrell, PhD

Advisory Committee

Co-Chair: Virginia Wright-Peterson, Vice Chancellor for Finance and Campus Resources

Co-Chair: Barry Standorf, Facilities & Operations Director

Daneille Awere, Rochester Student Association Student Body Representative to the Global Connections Community

Jered Bright, Senior Teaching Specialist, CLI

Jenny Casper, Interim Assistant Vice Chancellor for Student Success, Engagement and Equity

Norman Clark, Sr Dir of Academics

Javier Gutierrez, Assistant Vice Chancellor for Student Success, Engagement, and Equity

Paul Hanstedt, Vice Chancellor for Academic Affairs

Marcia Nichols, Associate Professor, CLI

Molly Olson, Director of Communication and Marketing

Mariah Peterson - Director of Residence Life

Mandy Phanthavilay, Rochester Student Association Student Body Representative to Staff Assembly

Chancellor's Advisory and Advocacy Council

Lori Carrell, Chancellor, University of Minnesota Rochester

Al Berning, CEO at Ambient Clinical Analytics

Gertrude Orakwue, Nurse Practitioner, Olmsted Medical Center

George Thompson, Owner of GB Thompson Solutions

Hugh Smith, Former CEO of Mayo Clinic

Jeff Bolton, Former CFO of Mayo Clinic

Mayor Kim Norton

Marilyn Stewart, Certified Residential Broker-Consultant

Mark Utz, MN Attorney, Rochester

Mohamed Addani, UMR Alumni, Ph.D Candidate - Clinical and Translational Scientist - Mayo Clinic Graduate School

Tim Penny, President/CEO Southern Minnesota Initiative Foundation

Tory Johnson, Former IBM Minnesota Senior State Executive and Vice President of Supply Chain Engineering at IBM

Walt Ling, Former Senior State Executive/Senior Site Executive, IBM (retired) Vice President, Technical support, IBM

Wendy Shannon, Chair

Students

Thank you to the many students who shared their perspectives in the MyCampus engagement tool and in conversations with the planning team.

Rochester Student Association

President Heidi Nguyen

Asmita KC, Living Learning Communities and Student Activities Coordinator

Community Collaboratory class CLI3522

Madison, Devon, Divine, Mia, and Sophia
James Thomas Ford, Student-Based Faculty
Jennifer Wacek, Senior Lecturer

Partners

Thank you to UMR's external partners who met with the planning team to provide invaluable data and insights:

City of Rochester

Mayor Kim Norton
Ryan Yetzer, Deputy Director of Community Development
Lauren Jensen, DMC Sustainability Coordinator
Scot Ramsey, Manager of Facilities and Property
Mike Nigbur, Director of Parks and Forestry

Destination Medical Center

Patrick Seeb, Executive Director
Catherine Malmberg, Director of Public Infrastructure and Strategic Development
Kevin Bright, Energy and Sustainability Director
Mike Flynn, Senior Director of Economic Development
Chris Schad, Director of Business Development

Mayo Clinic Education Shield

Brooke Wodziak, Director - Portfolio Management Office and Planning Services

Kristin Poe, Associate Project Manager - Education Strategic Planning & Portfolio Management Office

UMTC School of Nursing

Connie Delaney, Dean
Sherry Chesak, UMR Clinical Professor

Hormel Institute

Robert Clarke, Executive Director

Luther College

Jenifer Ward, President

Winona State University

Kenneth Janz, Interim President

UMN Extension Southeast

Lisa Dierks, Regional Director
Andi Sutton, Executive Director of the Southeast Regional Sustainable Development Partnership

Rochester Public Schools

John Carlson, Chief Administrative Officer

SPARK Children's Museum of Rochester

Heather Nessler, Executive Director

GH Holdings

Grant Michalet, Vice President

Hal Henderson, Principal at HGA

Titan Development

Andy Chafoulias, CEO
Jeff Bolton, Consultant

Mortenson and Colliers

Brent Webb, Development Executive
Laura Bodine, Director of Asset Management
Lindsey Thompson, Capital Markets Analyst
Mai Vang, Asset Manager
Louis Suarez, Senior Vice President (Colliers)

Landmark Development

Bob Dunn, President
Lynnette Slater Crandall, Director of Development, General Counsel
Jack Dunn, Financial Analyst

Kick-off Meeting in September, 2023

Thank you to all the partners who attended engagement meetings.

Community Partners		
City of Rochester	Alison Zelms	City Administrator
	Cindy Steinhauser	Deputy City Administrator - Development Services & Infrastructure
	Irene Woodward	Community Development Director
Destination Medical Center	Jamie Roth	Community Engagement & Experience Director
	Chris Schad	Director of Business Development
Mayo Clinic	Brooke Wodzick	Enterprise Program Manager
	Jeff Bolton	
	Doug Holtan	Chair of the Department of Facilities and Support Services
	Brad Lahr	Vice-Chair, Facilities and Support Services
	Erin Logan	Section Head of Facilities
	Randy Schubring	Manager of Communications in Community Engagement
	Guy Finne	Director, Office for Academic Partnerships
	Jess Anderson	Programs Manager/Senior Education Specialist
	Erin Sexton	Senior Director, Enterprise Community Engagement and Reputation Management
	Hormel Institute	Dr. Robert Clarke

Rochester Area Chamber of Commerce	Ryan Parsons	President
Rochester Public Library	Karen Lemke	Library Director
Cradle 2 Career	Julie Ruzek	Executive Director
University of Minnesota Extension	Lisa Dierks	Regional Director - Southeast Region
Rochester Area Economic Development (RAEDI)	John Wade	President
	Kirk Bustrom	Director of Economic Development
People's Food Co-op	Lizzy Haywood	CEO
Black Data Processing Associates (BDPA)	Ebenezer Kyei-Baffour	Executive Director
Greater Rochester Advocates for Universities and Colleges (GRAUC)	Catherine Davis	Executive Director
SPARK Children's Museum of Rochester	Heather Nessler	
Developers		
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	Carole Mette	Senior Developer
Landmark	Lynnette Slater Crandall	Director of Development, General Counsel at Landmark Development
Knutson Construction	Tony Joseph	Project Development Director
	Torrey Kistler	Director of Preconstruction
	Tom Leimer	Vice President
Mortenson Development	Brent Webb	Development Executive
	Louis Suarez	Senior Vice President

Kraus Anderson	Shawn Lortscher	Director of Operations
	Kelsey Vaszily	Director of Business Development
Venstar, LLC	Brenda Radichel Quaye	Owner
G&H Holdings	Hal Henderson	Principal
Blackswan (RDS)	Nick Stageberg	CEO
	Hunter Bradford	Property Manager
UMN Leadership	Leslie Krueger	Assistant Vice President, Planning, Space, and Real Estate
	Alice Roberts-Davis	Vice President, University Services
	Paige Rohman	Senior Assistant to the Vice President
UMR Leadership	Lori Carrell	Chancellor
	Virginia Wright-Peterson	Vice Chancellor for Finance and Campus Resources

Advisory Committee	Barry Standorf	Facilities & Operations Director
	Paul Hanstedt	Vice Chancellor for Academic Affairs and Innovation
	Norman Clark	Senior Director of Academic Affairs
	Mariah Peterson	Residential Life Director
	Marcia Nichols	Faculty, Center for Learning Innovation
	Andrew Caddock	Senior Planner
	Amanda Kohn	Sustainability Project Manager
	Monique MacKenzie	Planning Director
	Shane Stennes	Chief Sustainability Officer

Draft Plan Open House in March, 2024

Thank you to all the partners who attended engagement meetings.

Community Partners		
City of Rochester	Alison Zelms	City Administrator
	Irene Woodward	Community Development Director
	Ryan Yetzer	Deputy Director, Community Development
Rochester Public Utilities	Jake Shones	Plant Mechanic
Destination Medical Center	Patrick Seeb	Executive Director
	Jamie Roth	Community Engagement & Experience Director
	Chris Schad	Director of Business Development
	Lauren Jensen	Energy and Sustainability Manager
Mayo Clinic	Brooke Wodzik	Enterprise Program Manager
	Kristi Poe	Associate Project Manager - Education Strategic Planning & Portfolio Management Office
	Karen Helfinstine	Vice Chair Education Administration Assistant Professor Health Care Administration
	John Poe	
	Erin Sexton	Senior Director, Enterprise Community Engagement and Reputation Management
	Kendra Weber	Director of Campus & Student Services

Rochester Area Chamber of Commerce	Ryan Parsons	President
Rochester Public Library	Karen Lemke	Library Director
Greater Rochester Advocates for Universities and Colleges (GRAUC)	Catherine Davis	Interim Executive Director
Broadway Plaza	Scott Eggert	
	Jay Stoyles	
	Sherry Cesak	Clinical Professor
Developers		
Sherman Associates	Dan Collison	Senior Director of Business Development and Public Affairs
	Jeff Bolton	
Knutson	Tony Joseph	Project Development Director
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Colliers	Louis Suarez	Senior Vice President
	Kelsey Vaszily	Director of Business Development
Venstar, LLC	Brenda Radichel Quaye	Owner
HGA	Hal Henderson	Principal
	Hunter Bradford	Property Manager

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	Mariah Peterson	Residential Life Director
	Marcia Nichols	Faculty, Center for Learning Innovation
	Andrew Caddock	Senior Planner
	Amanda Kohn	Sustainability Project Manager
	Monique MacKenzie	Planning Director
	Shane Stennes	Chief Sustainability Officer





Appendices 6

Appendix A: Definitions

1. **Greenhouse gas emissions** - sometimes referred to as “GHG emissions”, “carbon pollution”, and/or “carbon emissions”, are pollution emitted by an entity that contributes to climate change. These emissions are gasses that trap excess heat in the earth’s atmosphere. Carbon dioxide is the most common greenhouse gas and is sometimes used to represent all greenhouse gasses. Other greenhouse gasses are methane, nitrous oxide, hydrofluorocarbons, perfluorocarbons, sulfur hexafluoride, and nitrogen trifluoride. Often these emissions are a result of combusting fossil fuels, but can also be from refrigeration systems and/or agriculture.
2. **Ambient loop** - a district system that uses medium temperature water, typically replacing steam heat to buildings. Each building that is part of the loop has a heat pump to release unwanted heat or cooling condensate to the loop and to consume that which is discharged by other buildings as part of the loop system.
3. **Carbon neutral** - a balance between emitting and absorbing carbon dioxide from the atmosphere.
4. **Decarbonization** - the process of reducing greenhouse gas emissions associated with energy consumption. This is inclusive of energy conservation through building efficiency projects and electrification.
5. **Electrification** - the process of converting building and campus heating sources from combustion (typically natural gas) to electrified sources (typically heat pumps).
6. **Energy Conservation Measure (ECM)** - reduces the energy use of a particular piece of equipment or building systems. ECMs can have varying impacts on reducing energy consumption (total energy consumed) or reducing energy demand (rate at which energy is consumed).
7. **Geothermal (also referred to as geo-exchange)** - this technology uses water and geothermal wells instead of air as a heat source and heat sink, depending on the required mode of operation. Typically, ground source heat pumps are paired with a bore field consisting of an array of wells drilled 500-1,000 feet deep. Units operate in either heating or cooling mode. They are more efficient than air source systems because of the temperate source/sink temperatures. A set of valves directs the chilled hot water and hot water to the appropriate building distribution system. Hot water temperatures more than 140°F are challenging for this equipment type so terminal equipment retrofits are often required.
8. **Green lease** - (also called a high-performance lease, or energy-efficient lease) is a lease agreement in which tenants and landlords commit to and work together to achieve energy efficiency, energy use, and other sustainability targets.
9. **Low temperature hot water system** - a system that releases heat from the generator at temperatures that do not exceed 130°F. This system is more energy efficient than a steam system and has less stringent operating staff requirements.
10. **Solar photovoltaics (PV)** - technology that converts sunlight to electricity.
11. **MTCO_{2e} or MTCDE** - Metric tons of carbon dioxide equivalent. This accounts for CO₂ emissions, as well as the global warming impact of other emitted gasses like NO_x and SO_x. The metric is meant to account for the overall global warming impact of an emission stream.
12. **Smart Lease** - the Smart Leasing approach refers to a decision making process generated during the campus planning process. As outlined in the UMR Campus Plan, Smart Leasing enables the University to vet locations based on a matrix of principles and priorities - not exclusively emissions and sustainability targets.
13. **Zero emissions** - When referring to building projects: a building that produces no greenhouse gasses during operation, i.e. during heating or cooling.

Appendix B: GHG Methodology

1. **Natural gas (heating, cooking)** - Building utility data was provided by UMR for some of the spaces it occupies primarily for FY22 and FY23. Where available, the data was averaged on a monthly basis to identify potential gaps. If metered data did not exist, the NREL COMSTOCK energy model database was used as a proxy. Energy models for similar building types based on location and mechanical systems were queried for their natural gas energy use intensity. This was scaled to the full building energy usage and scaled again for the proportion of the full building that UMR leases. Applying this methodology arrived at an estimate of 442 MTCO_{2e} as the 2024 greenhouse gas emissions from this source.
2. **Electricity (cooling, lighting, etc.)** - Building utility data was provided by UMR for some of the spaces it occupies primarily for FY22 and FY23. Where available, the data was averaged on a monthly basis to identify potential gaps. If metered data did not exist, the NREL COMSTOCK energy model database was used. Energy models for similar building types based on location and mechanical systems were queried for their electricity energy use intensity. This was then scaled to the full building energy usage and scaled again for the proportion of the full building that UMR leases. Applying this methodology arrived at approximately 2,446 MTCO_{2e} as the 2024 baseline estimate of emissions from this source.
3. **Fleet** - Fuel usage is collected each time UMR fleet vehicles are refueled. The total amount gallons of fuel by fiscal year is entered into the Sustainability Indicator Management and

Analysis Platform (SIMAP) to estimate the emissions. FY19 was used for the baseline emissions estimate because fleet usage is anticipated to return to pre-pandemic levels. This data was used to arrive at an estimate of 10 MTCO_{2e} as the 2024 baseline estimate of emissions from this source.

4. **Commuting** - Commute data was collected from employees and students during the MyCampus survey about their primary commute mode, distance traveled, and the number of commuting days for fall of 2023 (FY24). Fall population data was assumed for the entire fiscal year. A consistent survey tool will need to be developed to calculate commuting emissions in the future. SIMAP was used to estimate emissions for faculty, staff, and students. Where applicable, additional assumptions were made about commute mode, distance, and days commuting based upon student course schedules and housing arrangements. The current electric vehicle adoption rate was entered for staff and faculty, although its negligible at 0.4%. The annual commuting duration for faculty was assumed to be nine months to match their appointment, staff were assumed to commute 50 weeks to account for vacation, and students commuted for 34 weeks to account for the academic calendar. The available data and information provided through this study was used to generate an estimate of 282 MTCO_{2e} as the 2024 greenhouse gas baseline estimate of emissions for this source.
5. **University Sponsored Travel** - The University's central finance office provided purchasing data for flights, which is entered into SIMAP and converted to passenger miles and emissions. Only air travel emissions are partially reported at this time. For example, study abroad has not historically been tracked because students purchase air travel independently. Other

types of air travel are only moderately tracked through University purchasing systems. In the future, passenger miles, reasons for travel, and other data can be collected to improve the understanding of University sponsored travel emissions and better inform climate action going forward. Data gathering, including emissions related to ground transportation, is another area to improve upon. University data for FY23 was used to generate an estimate of 89 MTCO_{2e} as the baseline estimate of emissions for this source.

Appendix C: Green Leasing

Leases for space occupied by UMR are negotiated, executed and administered by the University's Real Estate Office in close consultation with UMR leadership and operations staff. Future leasing strategies (e.g. the smart leasing approach) and tools (e.g. green leasing) will be developed collaboratively with the University, and will be informed by engagement with current and potential lessors. One key consideration will be the status of the City of Rochester's future Thermal Energy Network.

A green lease (also called a high-performance lease, or energy-efficient lease) is a lease agreement in which tenants and landlords commit to and work together to achieve energy efficiency, energy use, and other sustainability targets. Examples of topics a green lease might cover include:

- Cost neutral agreements. For example, the tenant and landlord may agree that the tenant will pay towards the landlord's energy demand management investments in exchange for a stipulated reduction in energy and/or water costs. This arrangement should include an obligation by the landlord to provide evidence of the outcome of the energy investment (utility use reduction) and provide the tenant with access to records (auditing rights) to ensure cost neutrality.
- Energy efficiency. For example, the tenant and landlord may agree on terms that commit the tenant to mitigate waste of electricity, water, heat or air conditioning. The extent to which energy efficiency can be accomplished is predicted through an energy audit and building recommissioning and this calculus

serves as the basis for lease terms. Through the life of the term, energy use reduction is documented through metering of the lease space to establish the tenant's utility use patterns and the building owner's sharing of its utility bills. The details of this agreement can commit the tenant to use of specific, efficient types and models of equipment. For UMR's benefit, energy conservation measures should focus on reducing fossil fuel consumption (i.e. electrification). These types of measures will put UMR on the path to carbon neutrality as the electricity grid decarbonizes.

- Recycling and waste management practices. For example, the tenant and landlord may agree on terms that maintain the facility's waste management practices in compliance with municipal rules and/or through enrollment in a private program.
- Tax benefits for improvements. For example, the tenant and landlord may agree on terms for building improvements that qualify for tax benefits. Tax benefits would be available depending on the costs and ownership of the improvements.
- Power purchase agreements are another type of contractual agreement that can be supported by green leasing.

Third-party certification may be a component of a green lease as well. When the subject building is certified by a third party as a sustainable building (e.g. through LEED), the lease can stipulate that it is the landlord's obligation to maintain the lease in the condition that earned the third-party sustainability status. The landlord of a third-party certified building may stipulate that the tenant's improvements qualify for the US Green Building Council (USGBC) Leadership in Energy and Environmental Design (LEED) CI (commercial

interiors) or some other standard of green interiors/improvements.

The Green Lease Leaders certification, created in 2023 by the Institute for Market Transformation and the U.S. Department of Energy Better Buildings Alliance, offers silver, gold and platinum level recognition for efforts done in addition to prerequisites. Prerequisites may require both the landlord and tenant to provide sustainability information and implement a cost recovery clause for energy efficiency upgrades that benefit the tenant. The level of standing is then determined by the extent of utility tracking, disclosure, training, management practices, fit-out investments, and shared goals to advance social goals, building resilience and climate risk mitigation.

More information on green leasing, including process, example clauses, and case studies is available through the Green Building Alliance at www.gba.org.



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This publication/material is available in alternative formats upon request. Direct requests to Amanda Kohn, Sustainability Project Manager (usustain@umn.edu).

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UNIVERSITY OF MINNESOTA ROCHESTER
COORDINATED CAMPUS AND CLIMATE ACTION PLANS

Finance & Operations Committee

June 2024

A. Purpose of Coordinated Campus and Climate Action Plans

In 2022, University Leadership directed staff to create an integrated, seamless set of plans that will shape the future of each campus in terms of physical changes and the system's climate action commitment. Rochester's process got underway in August 2023 and concluded in April 2024.

The coordinated Campus and Climate Action Plans describe the vision and key recommendations for the campus. The plans are developed from primary drivers and reflect the institution's values at a systemwide and campus-specific level. They also serve as a foundation to guide and inform near- and long-term planning for capital investments. Future Six-Year Capital Plans identifying specific projects as well as funding sources are examples of how the campus and climate action plans are implemented.

The near-term horizon for the UMR coordinated Campus and Climate Action Plans is ten years - through 2034. The plans also recognize several immediate UMR priorities over the next 1-3 years, when UMR projects enrollment will exceed the Bold goal of 1,000 students. Other recommendations for physical change are linked to a long-term horizon through 2050. Updates to the plan will occur approximately every ten years, both to support evolving needs and priorities for the UMR campus and to respond to opportunities among partners in Rochester.

This effort addresses UMR leased premises and the University-owned land in Rochester's Education District.

B. **Plan Drivers**

The following plan drivers represent the many influences that shaped the Plan recommendations for the future of the UMR campus. These are explained in more detail in the plan document in section 2, Plan Drivers.

1. UMR Mission and Vision

Inspire transformation in higher education through innovations that empower graduates to solve the grand health challenges of the 21st century.

On May 10, 2024, Chancellor Carrell reviewed the UMR's mission and vision in her presentation to the Board on *Enrollment Strategy Plans and Financial Impacts*. For more information on UMR Vision and Grounding Values, see this link:

<https://r.umn.edu/about-umr>

2. Systemwide Campus Planning Principles

The Board of Regents approved the campus planning principles listed below in February 2021. These serve as expectations that ensure the effectiveness of campus plans and are the foundation of the Regents' review and ultimate approval of each location's campus plans. The University system has a long history of regularly updated campus physical plans, which have traditionally been known as campus master plans.

1. Establish a sustainable vision of how each campus's physical setting will embody its distinctive history, mission, and future.
2. Create an inclusive and welcoming experience for the increasingly diverse range of people who come to campus.
3. Optimize existing physical assets to facilitate flexible and innovative solutions toward an enduring future.
4. Consider the cost of attendance, investment, and operations when planning for each campus' future.
5. Integrate each campus' master plan with the Systemwide Strategic Plan.
6. Ensure an inclusive, accountable, and forward-looking process for developing and implementing the master plan.

Physical plans for each of our campuses address questions of growth, capital renewal, and interaction with the surrounding community, all based on the priorities shaped by the institution's mission of research, learning, and outreach. These principles are a strong

foundation for best practices in campus master planning, and they reflect changes in good planning practice by integrating themes such as sustainability, inclusion, diversity, and innovation in the face of an uncertain future.

3. Systemwide Strategic Plan: MPact2025

The campus plan and climate action plan are aligned with the systemwide strategic plan, MPact 2025, regarding campus planning (Commitment 5, Action Items 5.3) and climate action planning (Commitment 3, Action Items 3.2).

Many of the plan recommendations embody the commitments outlined in MPact 2025, as noted below.

Student Success: Student success is supported by many recommendations throughout the plans, in particular by the idea of creating a “Heart of the Campus” at University Square, a place where students can gather informally, find support services and amenities, and receive academic assistance at “JustASK” locations.

Discovery, Innovation, and Impact: The plans’ recommendations support the student engagement and partnership goals of UMR with the intent of fostering discovery and educational innovation, extending opportunities for community engagement and experiential learning, and continuing UMR’s role as a strong partner in downtown Rochester.

MNtersections: The plans prioritize spaces for collaboration to serve as a model in health education while demonstrating state and worldwide leadership in sustainability.

Community and Belonging: The plans identify strategies to develop places for UMR students, faculty, staff, and partners to gather with the goal of fostering community and belonging on campus and in the surrounding context.

Fiscal Stewardship: The plans provide near-term and long-term strategies for optimizing building leases, creating shared programming, and aligning future facility development in the interest of UMR’s sustainable future.

4. Enrollment and Demographics

UMR has three distinct enrollment targets identified in the 2019 Bluff Top View, which was reviewed and approved by the Board of Regents in May 2019 and aligned with MPact 2025 in 2021. Fall of 2024 enrollment was 932, just short of the “Bold” goal of 1,000 students served on campus. Since the campus’ origins in 2009, enrollment has shown generally

consistent growth. Enrollment has remained relatively stable at nearly 1,000 students annually served at the UMR campus since 2020.

Future growth ('Bolder' enrollment) identifies a mid-range target of 1,500 students served on campus. UMR predicts that with the appropriate investments in faculty, staff and facilities, this mid-point target can be reached within 5 years (by approximately 2030). The most ambitious enrollment target of "Boldest" campus size sets a goal of 2,500 students served on campus. Regarding the profile of these students at each threshold, consistent freshman enrollment is critical to attaining MPact 2025 enrollment goals. The ability to enroll new high school graduates as a prescribed share of the overall enrolled population is the basis for a fiscally and physically sustainable campus development strategy.

5. Climate Action

In MPact 2025 (Commitment 3, Action items 3.2), the University committed to building a fully sustainable future and identified three actions to advance this goal:

- Demonstrate state and worldwide leadership in sustainability and environmental teaching, research, and convening power.
- Develop system leadership and governance coordination for sustainability initiatives.
- Establish next-generation systemwide Climate Action Plan.

Climate change has been referred to as the greatest challenge of the 21st century and an existential threat to humanity that is already causing harm to people, communities, and ecosystems here in Minnesota and around the world. Those impacts will become more severe and pronounced if the causes and symptoms of climate change go unchecked.

Shifts in climate have already occurred in Minnesota and globally. Many climate impacts are expected to worsen. Extreme events, like flooding, drought, and heat waves, will likely become more frequent and more intense with climate change in the future.

In response to these challenges each University campus is developing a plan for eliminating its greenhouse gas pollution and making the campus more resilient to the effects of climate change. This is the basis for creating climate action plans paired with campus plans.

UMR's GHG emissions covered in the Climate Action Plan primarily come from building use and transportation. The only emissions currently in UMR's direct control (Scope 1) are from the University Fleet. All other emissions are considered indirect (Scope 3), such as

electricity and natural gas usage in leased space and commuting. Given this, partnerships to advance shared climate action goals are of the utmost importance. Likewise, building climate resilience on campus will be part of the community's advancement in this area.

C. **Geographic Context**

Rochester is a city of approximately 125,000, with deep roots as a regional center hosting large-scale employers, including IBM and Mayo Clinic. Due to the City's economic strength and other community amenities, the city and its immediate surroundings have experienced 50% growth since 1990. In 2009, the campus was established due to significant community interest and effort, intended to support world-class, University of Minnesota academic programs leading to employment or advanced study in the healthcare industry. Since its inception, UMR has established its presence in Rochester as a tenant and anchor on one side of Peace Plaza, in the heart of Downtown. In 2023, the University held leases in six buildings in Downtown Rochester, totaling 320,000 RSF along with a limited number of parking spaces. In addition, the University has leased 711 student housing beds, primarily at the Student Life Center and 318 Commons, prioritized to first- and second-year student residents.

In 2010, the University started to acquire land on the southern edge of Downtown, in alignment with the City's plans, in order to establish a future 'Education District' as a complement to the mix of activity found in other Downtown districts (Heart of the City, Discovery Square) where UMR is active today. Today the University holds 4.8 acres in this district.

Over the last 10 years, the City and its partners have taken a strong lead on climate action, committing to sustainable standards at the City scale and, most recently, acting as the lead development entity for a district energy initiative based on thermal energy.

D. **Analysis and Engagement**

Consistent with one of the Regents' approved campus planning principles, the planning work completed to date was designed to ensure an inclusive, accountable planning process. For the systemwide Campus and Climate Action Plans, there are a number of methods and activities that have been developed to learn about each campus' communities aspirations for the future. These efforts include large group meetings, small focus groups, website-based communication, as well as countless conversations between students, faculty, staff and partners in the Rochester community.

One of the tools used was an interactive mapping tool that asked respondents to designate places of significance (live, eat, study, work, and play). This tool is known as the 'My Campus' mapping survey and will be used as part of campus planning at all system campus sites. Sasaki adapted this tool specifically for UMR. UMR Communications staff promoted MyCampus through campus-wide emails, social media posts, hallway video screens, posted flyers, weekly newsletters, and announcements in large assemblies. MyCampus was open for two weeks in October 2023. All 1,035 students, faculty and staff were invited to participate. A total of 128 individuals responded by marking more than 1,000 campus locations and sharing more than 400 comments. Of respondents who identified themselves, 46% were students, 34% were staff, and 20% were faculty.

Each campus and climate action planning effort relies on a volunteer group of advisors to guide the planning process. In this case, the Chancellor's office appointed members of this Advisory Committee in August 2023. The group convened monthly with the planning team to discuss findings, advise on engagement and communications plans, and to comment/refine draft recommendations. The Committee comprised student representatives, faculty, and staff. Monthly meetings were hybrid, and the planning team joined two Committee meetings in person. Committee members also attended on-campus engagement events to help the planning team encourage feedback from the campus community.

Late 2023 was a pivotal engagement period. In October and November, the planning team solicited comments on their data-analysis findings and MyCampus summary in several formats, including two dedicated Zoom forums, a monthly meeting attended by all faculty and staff, the Chancellor's annual State of the Campus address, and the project website.

In December, the planning team hosted an in-person open house for students, faculty, and staff to discuss preliminary findings and potential scenarios. The meeting was well attended and garnered a wealth of comments which informed the plan. Another meeting of this nature was held in March 2024 to gather comments on draft recommendations. UMR Communications staff promoted the meetings to all students, faculty and staff through multiple communications channels. Attendees shared feedback with the planning team in discussion and written comments, all recorded directly on display materials using Post-it notes.

In addition to promoting student attendance at open house meetings as described above and seeking input from student members of the Advisory Committee, other ad hoc, casual conversation modes were important sources of driving student awareness. Early in the process, information tables in student common areas helped build awareness, and a meeting with Rochester Student Association (RSA) leadership clarified student priorities. RSA also co-promoted MyCampus and other engagement opportunities. A student team

from the class “CLI 3522: Community Collaboratory” even adopted the CCAP as their class project. The planning team advised the students as they adapted MyCampus questions for use in focus groups with their peers and a targeted survey. The student team’s findings, which echoed many of the MyCampus results, were presented at a class symposium in April.

Since its inception, UMR has worked whenever possible on common objectives with public and private partners across the city and the region. The range of partnerships includes building managers/owners that house leased space to service providers delivering essential aspects of student life, like recreation and student health/ wellness clinics. Given UMR’s pedagogical strengths and focus on successful student outcomes, Mayo Clinic School of Health Sciences teams with UMR to develop shared curricula and instructional facilities.

Two open house meetings were held specifically for external partners – one to introduce the process and solicit comments and one to share draft recommendations. Each was attended by more than 50 people, including executive leadership and operations staff. (See the Acknowledgements for a full list of attendees.) The planning team also met individually with nearly two dozen of UMR’s existing and prospective partner organizations to explore opportunities for shared visions, facilities, and programs. In all, the planning team met with nearly two dozen of UMR’s external partners and met more than once with key partners such as Mayo Clinic’s Education Shield, Destination Medical Center, and the City of Rochester.

E. **Big Ideas**

The UMR plan is based on nine big ideas that emerged from the assessment and consultation process with the campus community. These ideas are the basis for the key recommendations of the plan and represent actions that should shape the near—and long-term future of the UMR campus. The Big Ideas were developed in response to drivers and principles articulated in the Campus and Climate Action Plans.

Big Idea #1. Create functional, healthy, and accessible UMR spaces.

Time Horizon: Near

Campus Plan Focus

Improvements to the current leased space would enhance the campus experience. To support innovative learning environments while continuing to grow, the University should look into creative ways to make existing spaces work better to support campus and climate action goals.

Big Idea #2 – Develop a “smart lease approach” to reach campus and climate action goals.

Time Horizon: Near | Long

Campus and Climate Action Plan Focus

The smart lease approach is a decision-making tool to support the University in leasing and space migration decisions. The smart leasing approach asks UMR to consider four key principles when reviewing location criteria: design guidelines, enrollment goals, climate action, and location. The goal is to deliver on the qualitative goals for space set out by UMR and to ensure that future leases are responsive to the UMR climate action goals. The smart lease approach is inclusive of climate action-specific tools, such as green leasing; green leasing is one implementation tool to consider when making decisions about spaces. The smart lease approach will guide both long-term and near-term lease arrangements at UMR.

Big Idea #3. Plan for new UMR specialty spaces.

Time Horizon: Near | Long

Campus Plan Focus

There are several desirable specialty spaces not currently provided by UMR or others and that could be provided in the near-term and long-term. These spaces would enhance the mission of UMR. The specialty spaces identified in Big Idea 3 could be developed by UMR over the next 10 years and beyond through collaboration with key partners.

Big Idea #4. Develop in the Education District to support enrollment growth.

Time Horizon: Near | Long

Campus and Climate Action Plan Focus

UMR’s current location in downtown Rochester, in close proximity to the Mayo Clinic and other partners, contributes to mission success. The Education District provides additional opportunities to support UMR’s needs and other purposes as enrollment increases to 2,500. As UMR develops in the Education District, leased facilities will be maintained downtown.

Big Idea #5. Work with partners to create additional specialty spaces.

Time Horizon: Near | Long

Campus Plan Focus

There are several exciting opportunities for partnerships that can support desirable space types not currently accounted for in UMR facilities including an immersion learning lab, active learning opportunities at Mayo, childcare, and outdoor and indoor recreation.

Big Idea #6. Work with the City of Rochester and DMC on greenhouse gas emissions reduction goals and climate resilience—because UMR climate action success relies on collaboration.

Time Horizon: Near | Long

Campus and Climate Action Plan Focus

Much of UMR's ability to reduce GHG emissions and build community resilience will depend on partnership with and action by others, especially the City, DMC, Rochester Public Utility (RPU), and lessors. Partners are well-equipped to support these goals because they share similar GHG emissions reduction targets and climate action goals. UMR plays a critical role in supporting this work through application of University expertise, engaging the UMR community, advocacy, and being a proactive tenant.

Big Idea #7: Reduce emissions from vehicular transportation and make sustainable commuting the easy choice.

Time Horizon: Near | Long

Campus and Climate Action Plan Focus

Opportunities for reducing transportation-related emissions over the next decade will focus on electrification, and changes in modal split to favor walking, biking and transit. The following strategies will be deployed to advance UMR's carbon reduction and mobility goals.

Big Idea #8: Continue to expand the integration of climate change mitigation, climate resilience, and sustainability into UMR curriculum and co-curricular activities.

Time Horizon: Near | Long

Climate Action Plan Focus

Continued institutional and academic focus on climate change mitigation and community resilience will be critical as UMR educates future generations of students whose lives and health will be impacted by climate change. This could involve expanding public health courses and increasing the focus on diseases and conditions that may become more prevalent due to climate change.

Big Idea #9. Advance climate and community resilience priorities on campus.

Time Horizon: Near | Long

Climate Action Plan Focus

In alignment with the City of Rochester's Sustainability and Resilience Community Work Plan and climate change impacts on Minnesota and Olmsted County, UMR will advance the

efforts to build resilience across the campus community, infrastructure, and the environment.

F. **Decarbonization and Resilience Framework**

The Climate Action Plan (CAP) identifies near- and long-term goals and strategies across five significant campus emission categories. UMR will reduce GHG emissions by 85% compared to a baseline scenario by 2034 on the pathway to carbon neutrality by 2050 or earlier. Key actions to achieve the 2034 target include:

- Rochester Public Utility provides carbon-free electricity.
- UMR leases zero-emission spaces as agreements expire.
- Over 50% of employees and 60% of students will commute by bike, on foot, transit, or carpool. Electric vehicle adoption rates will increase to 10% for employees and 5% for students.
- The entire UMR fleet will be battery-electric or plug-in hybrid-electric.
- A mission-driven carbon offsets program for University-sponsored travel will be established systemwide.

The Climate Action Plan also identifies high-level strategies to improve community resiliency relative to climate change in alignment with the City of Rochester's Sustainability and Resiliency Action Plan to include:

- Community
 - Focus UMR outreach activities on projects with benefits to environmental justice neighborhoods and communities.
 - Sustain and expand equitable food access.
 - Partner to ensure the entire UMR campus community continues to have adequate access to physical and mental health care.
 - Incorporate climate resilience into the Culture of Safety Plan.
 - Regularly provide the UMR community with guidance about how to stay safe during extreme weather events.
- Environmental
 - Reduce water consumption on campus.
 - Take action to reduce the volume of waste generation on campus and establish a three-stream waste management system.
- Infrastructure
 - Create design guidelines for buildings, infrastructure, and land that incorporate future climate projections, improvements for well-being, and redundancies for critical operations.

- Partner with the City and other partners to advocate and plan for effective public transportation options that provide safe and cost-effective ways to commute and get around.
- Align with the City of Rochester's Emergency Management Plans.

Finally, the Climate Action Plan lays out a series of cross-cutting, systemwide initiatives to advance climate action as specifically applied to the Rochester campus. These include work on building a culture of sustainability, developing innovative funding models, further connecting climate action to curricular and research efforts, and building capacity for implementation.

G. **Implementation/ Phasing Strategy**

This Implementation section highlights priorities identified by UMR during the planning process through extensive engagement with leadership, students, faculty, and staff—especially those near-term initiatives that will support continued enrollment growth.

The UMR Campus and Climate Action Plan components are considered in the near term (within the next 10 years) and long-term (approximately 30 years).

Near-term Priorities

In the near term, there are immediate initiatives that should be pursued over the next one to three years to propel UMR beyond its start-up status by supporting new programs and addressing space needs that exist today or will emerge as enrollment exceeds the Bold goal of 1,000. Through enrollment growth of 1,500 students, additional facility needs will emerge, expected within the later part of the near-term horizon (10 years).

Campus Life/ Student Success

University Square anchors UMR's campus life. Sustained enrollment growth will drive increased demand for offices and active-learning classrooms. Renovations to the third and fourth floors will strengthen UMR's identity as a welcoming downtown presence, improve operations, and yield space efficiencies. The following programmatic additions will be considered in the near term:

- **Create a Heart of the Campus** - Remake the atrium area as a central space for informal gatherings, a welcoming campus living room, and a bustling and flexible social space with abundant natural light and views of downtown.
- **Create an Internship and Career Center** - The Center will be a nexus of opportunities and training resources for UMR students as prospective interns,

linking them to potential internship providers such as Mayo Clinic, Hormel Institute, biotech tenants in Discovery Square, and many others.

- **Create a second academic house/neighborhood** - UMR's "house" model maintains cohesion among student cohorts as enrollment grows. As demonstrated by the success of the JustASK space in 318 Commons, the house combines faculty and success coach offices, study areas, and social spaces to serve students and faculty by providing a supportive environment and a sense of collective identity. As a physical space to anchor collaborative academic activities, the house will be flexible, focused, and bright.

Learning Spaces- Classrooms and Teaching Labs

Based on Fall 2023 enrollment, one additional active-learning classroom is needed immediately. UMR anticipates that a net total of three additional classrooms will be needed over the next two to three years depending on enrollment levels.

Instructional Development Center

To support UMR's pedagogical excellence, another physical space designed and operated to support professional development that "educates the educators" would serve UMR faculty, partner higher-education institutions, and even K-12 science instructors across the state.

Partnership Collaboration for Specialty Spaces

There are a handful of other spaces that would support UMR's activity. These facilities are highly specialized and unlikely to be feasible if undertaken solely by UMR. These spaces should be developed from common sets of needs and operated primarily by one or more of UMR's partners, such as Destination Medical Center, Mayo Clinic, the City, or other entities, where UMR could be a tenant or contributor. Descriptions of these spaces are included in the implementation selection of the report. Descriptions are included below:

- Immersion learning lab
- Gym for intramural sports and other campus activities in downtown -
- Childcare

Partnership for Climate Action- Green Leasing Strategies and TEN

In the near term, leasing strategies will engage current and potential lessors around terms for 'green lease' agreements, focused primarily on building performance and energy sources, reinforced by the potential for zero emissions heating and cooling in the form of the Thermal Energy Network (TEN) planned by the City of Rochester.

Commuting and Mobility Improvements

Vehicle commuting and carpooling, as well as efforts to expand public EV charging infrastructure, will contribute to UMR's climate action goals. The supply and cost of parking as campus population increases must be considered in the context of providing incentives to use other travel modes and accommodating demand for parking as it evolves over time.

Transit incentive programs are another near-term action. Expanded skyway and subway connections that provide weather protected access throughout UMR- occupied buildings and other downtown sites are near-term priorities.

Wayfinding and campus safety - UMR will partner with building owners, DMC, and the City to ensure UMR-specific needs for wayfinding and campus safety are integrated with building operations and downtown initiatives.

Outdoor Recreation - UMR will continue to pursue partnerships with the City to make outdoor recreation facilities available to students, faculty, and staff. Soldiers Field Memorial Park, south of downtown could be better linked with UMR facilities and the Education District by extending City trails through the Education District to connect with the existing network.

In the near term, the University-owned **Education District** will evolve to accommodate the extension of the Discovery Walk connection from University Square past Discovery Square to the Education District and Soldiers Memorial Field Park. UMR is already maintaining native grasses and trees on top of the capped former industrial site in the Education District. In the near term, the use of low-maintenance plant communities should continue. Additional temporary activations might include outdoor sports pop-ups or other temporary uses.

Resilience

UMR plays a critical role in supporting this work through application of University expertise, engaging the faculty, staff, and students, advocating for other partner-led efforts, and being a proactive tenant. A few examples are highlighted below:

Infrastructure

- Create design guidelines that incorporate future climate projections, improvements for wellbeing, and redundancies for critical operations.
- Partner with the City and others to advocate and plan for effective public transportation options that provide safe and cost-effective ways to commute and get around.

Community

- Sustain and enhance an equitable food access plan.
- Partner to ensure the entire UMR campus community continues to have adequate access to physical and mental health care.
- Regularly provide the UMR community with guidance about how to stay safe during extreme weather events.

Environment

- Reduce water consumption on campus.
- Reduce the volume of waste generation on campus and establish a three-stream waste management system.

Long-term priorities

In the more distant time horizon (more than 10 years), enrollment is anticipated to increase to 2,500 students served. A number of unique facility and space needs emerge as the population on campus increases. Other key actions, such as fulfilling systemwide commitments to carbon reductions in commuting, and engaging leased space terms to drive improved building energy performance, among others will continue as described to in the near-term horizon.

Downtown strategic presence - Maintaining the visibility and prominence of UMR in the heart of Downtown is essential to its identity as a health sciences campus committed to addressing Minnesota's health care workforce shortages and health disparities. This strategic presence should maintain the educational/learning and partnership activities that have been central to UMR's evolution as a unique and valued member of the Rochester community.

Development of the Education District - As enrollment approaches 2,500, additional housing will be required to accommodate first- and second-year student demand. Academic spaces unique to the UMR model – an academic house where students, faculty and student success coaching staff co-locate, similar to existing UMR spaces – are likely to expand to the Education District as well. Amenities to support campus life, from social spaces to recreation are expected as well.

Rochester Campus Plan

Lori Carrell, Chancellor, Rochester Campus

Greg Havens, Principal, Sasaki Associates, Inc.

Monique MacKenzie, Director of Campus Planning

Shane Stennes, Chief Sustainability Officer

Finance & Operations Committee

June 13, 2024

SENIOR VICE PRESIDENT FOR FINANCE AND OPERATIONS

World Class Services for a World Class University



University Services

We Make the University Work

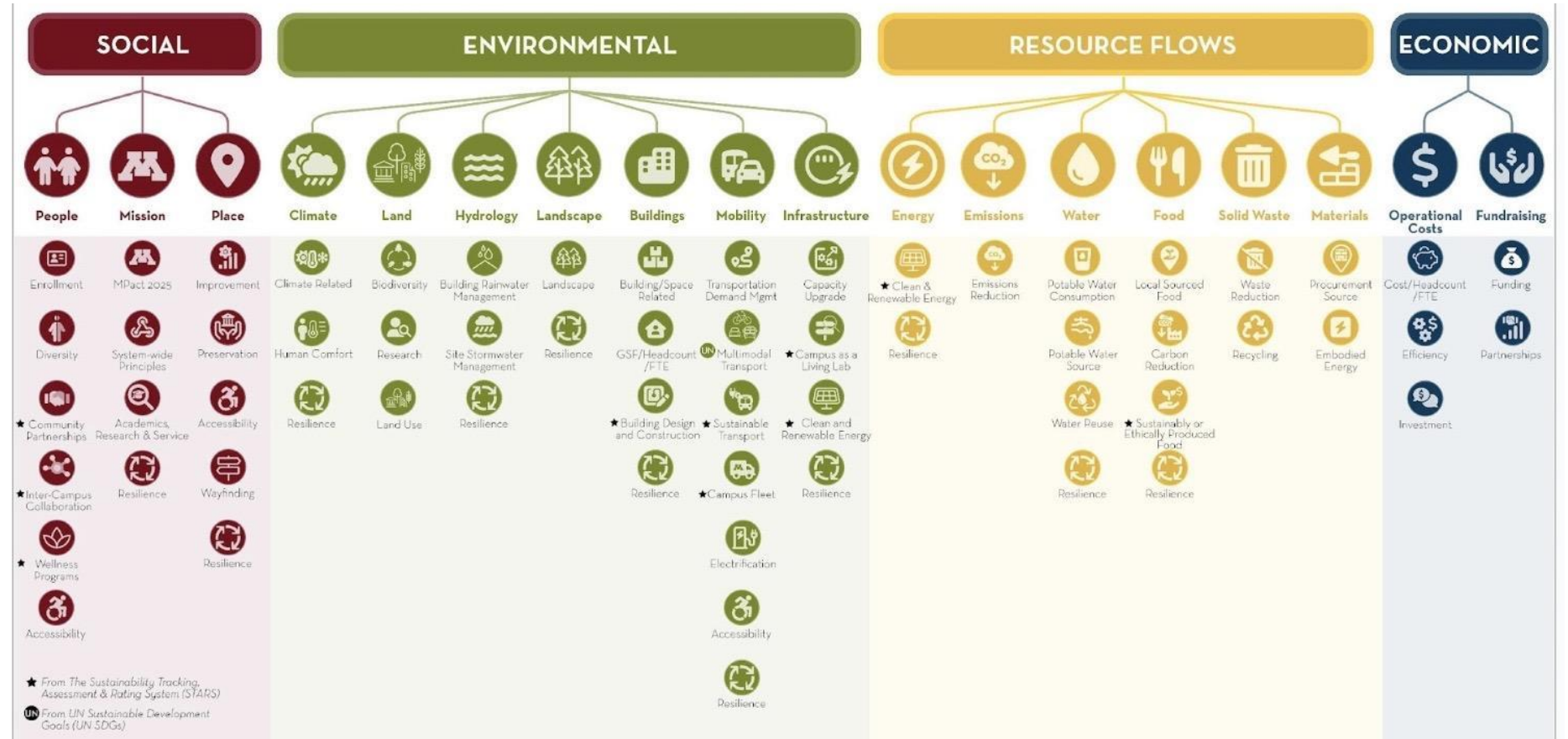
Today's Discussion

1. UMR Campus Plan

Review by Board of Regents for future Action

1. UMR Climate Action Plan

Discussion



Campus and Climate Action Plans make use of an integrated, holistic framework to define the desired future state of the UMR campus.



Vision: The University of Minnesota Rochester will **inspire** transformation in higher education through innovations that **empower** our graduates to **solve** the grand health challenges of the 21st century.

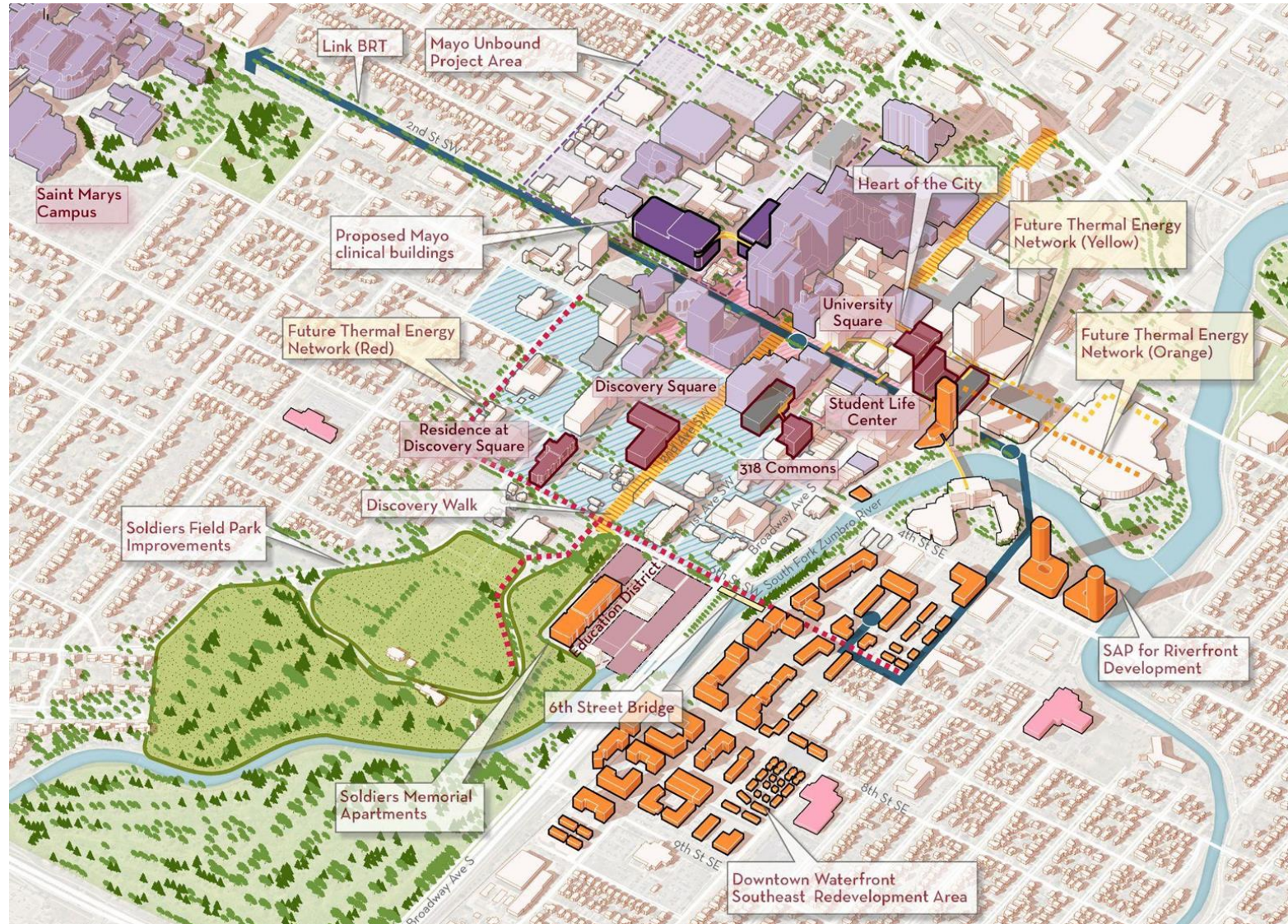


UMR in the Future

Vibrant surroundings with significant opportunity for the University.

UMR is an engine for a flourishing Rochester.

Growth and expansion is happening all around UMR and the Education District.



Why undertake campus and climate action planning (CCAP) together?

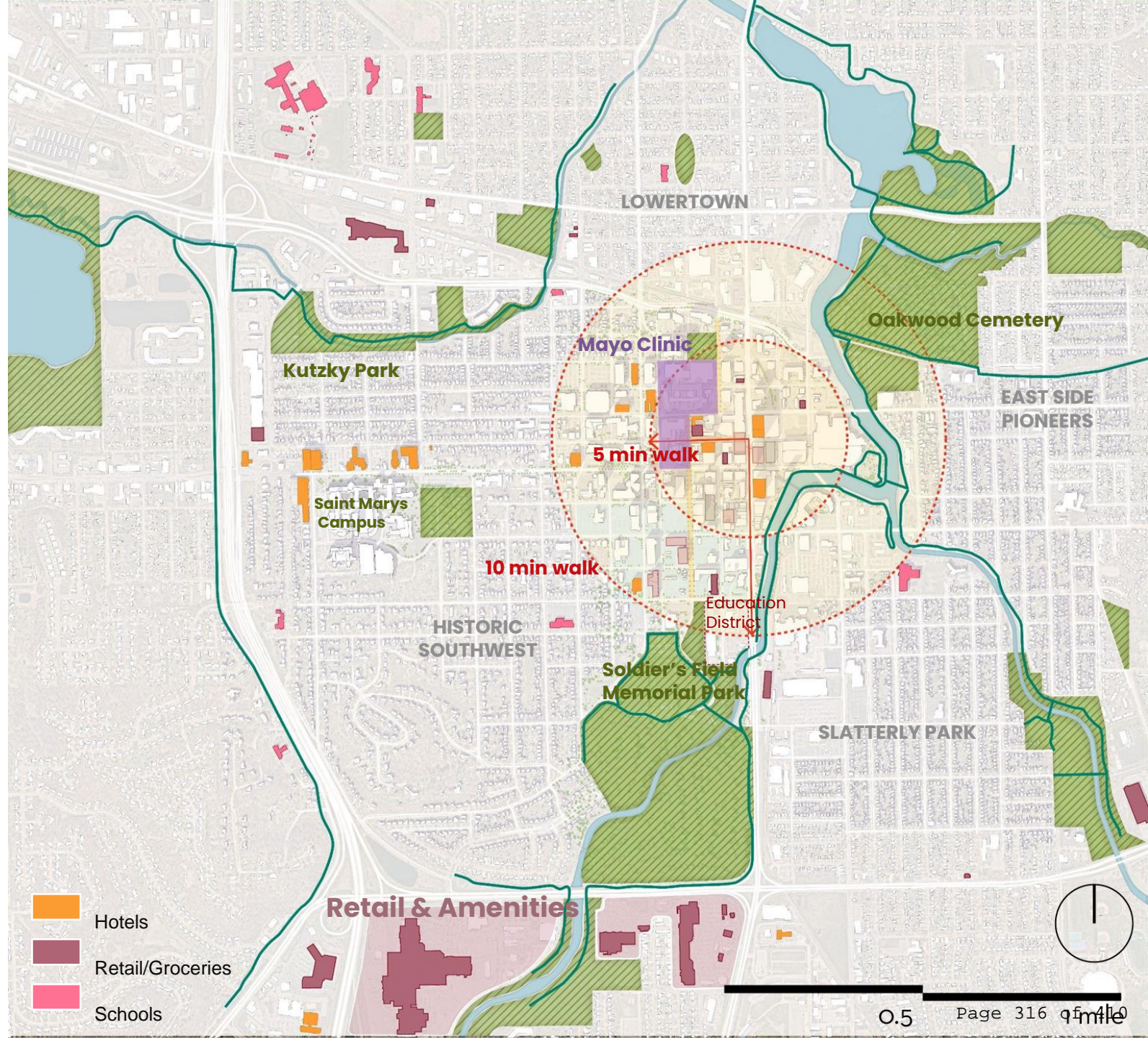
1. Advance MPact 2025's systemwide commitment to envision and build a sustainable future through decarbonization and climate change resilience.
2. Support UMR's long-term strategic growth by developing principles to guide decisions about the physical campus: facilities, spaces and landscapes for teaching and learning, student life, mobility, and community connections.
3. Explore existing and potential partnerships to meet shared goals around both UMR Vision and systemwide sustainability goals.



Overview

UMR Context

- Began serving students in 2009
- Embedded and invested in the success of downtown and the region
- Critical relationships and partnerships with Mayo Clinic, the City of Rochester, Destination Medical Center, and many others



Planning Drivers

UMR Mission, Vision, and Values

Student Success & Employee Wellbeing

Enrollment Growth

Real Estate

Community Context

Sustainability Commitments

Planning Principles



Flexibility & Adaptability

Physical Space: Flexible spaces are important for a variety of learning and collaboration needs.

Decision-Making: Generate solutions and scenarios that support UMR growth in the near- and mid-term, and UMR stability in the long-term.



Proximity & Connection

Proximity within UMR and within the Rochester community can foster long-term relationship-building and serendipitous connections that directly contribute to student and community success.



Inclusivity & Welcoming

Continue supporting, and look to better support, the needs of all in academic, housing, and student life spaces.



Optimization & Climate Action

Physical assets should be optimized to support UMR and system-wide goals, including:

- student learning
- campus culture
- healthy buildings
- climate action
- fiscal stewardship

Analysis



Mission, Vision and Values

Students are at the center

Research informs practice

Partners make it possible

UMR's strategic growth priorities of research-based learning, resource stewardship, partnership, and academic equity attainments focus our Campus and Climate Action Plan.

VISION DRIVES OUR STRATEGIC GROWTH

The University of Minnesota Rochester inspires transformation in higher education through innovations that empower our graduates to solve the grand health challenges of the 21st century.

Our strategic growth priorities of learning, resource stewardship, collaboration and communication will focus our planning and ensure our outcomes always align with our vision.



Recommendation: Invest in campus learning and personal development in support of evidence-based practices, student success, and equity in educational attainment.



Student Success and Employee Wellbeing

Questions for our Campus Community

1. What enhancements would foster or improve the "Heart of the Campus"?
2. Are there places downtown outside UMR facilities that students utilize for study or social activities?
3. What are the greatest opportunities in the Education District?
4. In reviewing the recommendations under Big Ideas #9 related to campus and community climate resiliency -- do any of these feel more or less important? How do we continue to advance equity through physical design and programming for climate resiliency?

DISCUSSION



Recommendation: Expand spaces that support student success and faculty achievement in the scholarship of teaching and learning at UMR.



Enrollment and Facilities Need

enrollment level

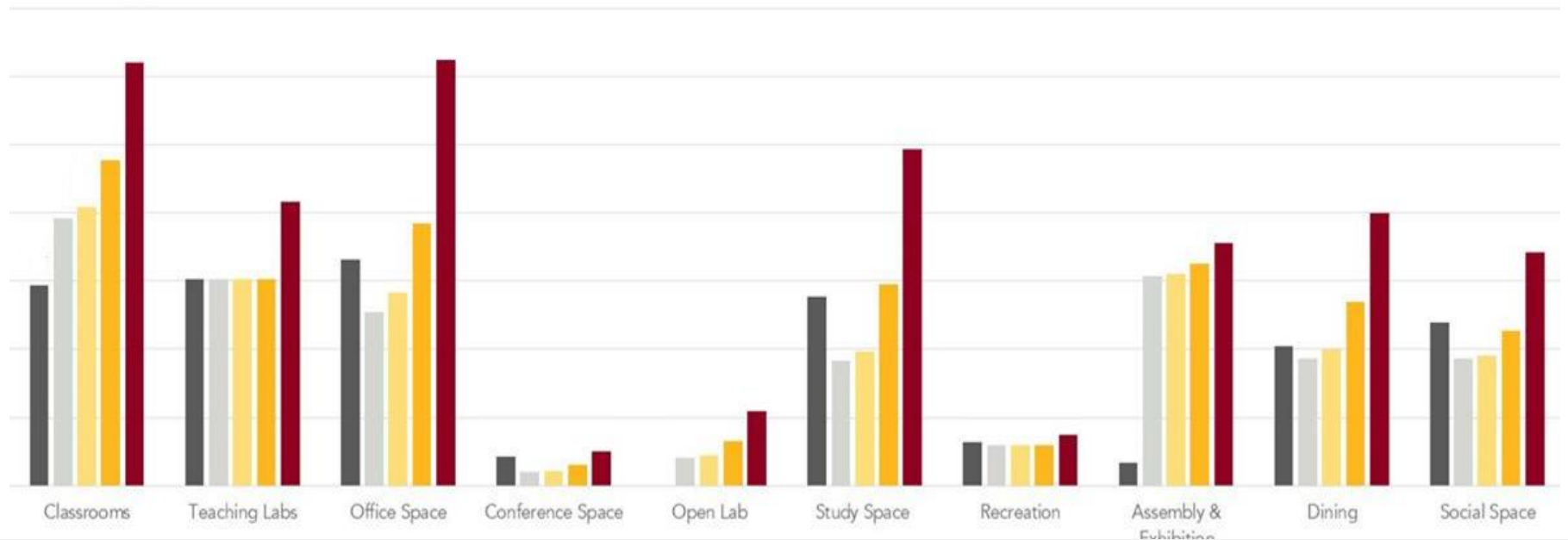
1,000 Bold

1,500 Bolder

2,500 Boldest

existing space

existing **need**



Recommendation:

1. Plan and design spaces to be flexible as needs change over time, up to 1,500 student enrollment (Bold).
2. Expect significant new space needs when enrollment approaches 2,500 students (Boldest).



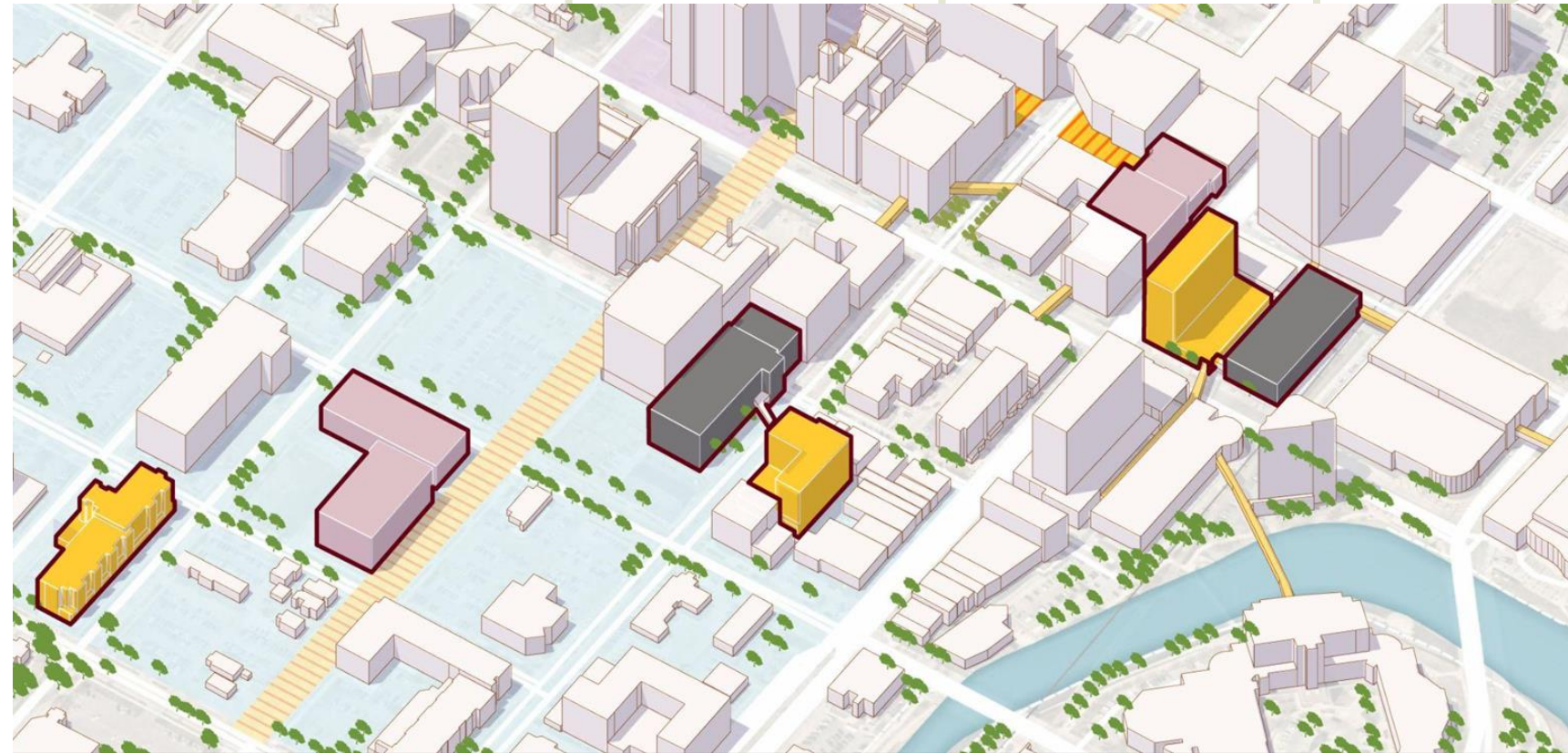
Real Estate- Leases and Land

Leased facilities

- 6 buildings
~320,000 assignable sq ft
- 2 parking facilities currently
the stall count varies with
need
- 711 student housing units

UMN-owned land

- 4.8 acres in the Education
District



Recommendations:

1. Negotiate lease terms to meet climate action goals while maintaining a strategic presence Downtown.
2. Pursue Education District uses aligned with city goals and UMR development.



Community Context- Partnerships

Mayo Unbound:

New facilities for research and educational activities and clinical care, bringing more patients and staff/providers

Destination Medical Center:

Med tech development support, improving workforce readiness and expanding research initiatives.

City of Rochester:

New bus rapid transit, community-use sports complex, expanded thermal energy network (TEN) and riverfront redevelopment.

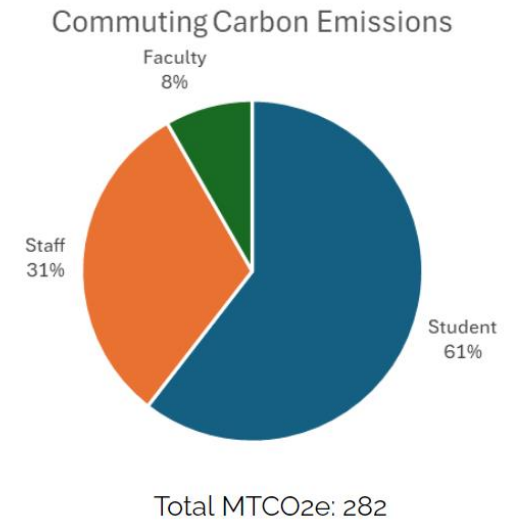
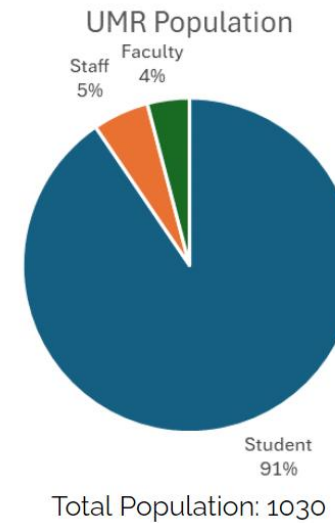


Recommendation: Explore shared needs for innovative teaching spaces, childcare, and climate action.



Mobility and Connections

- Students and employees commute differently.
- Many students live downtown in UMR housing or private accommodations.
- Students prefer carpooling when leaving downtown for necessities or entertainment.
- Hybrid approximations:
 - Staff ~ 1/3 of commuting days
 - Faculty ~ 1/5 of commuting days
- Solo driving
 - Staff ~ 70-80%
 - Faculty ~ 50-60%
 - Students (excluding on-campus residents) ~ 50-60%



FY24 (Fall 2023)

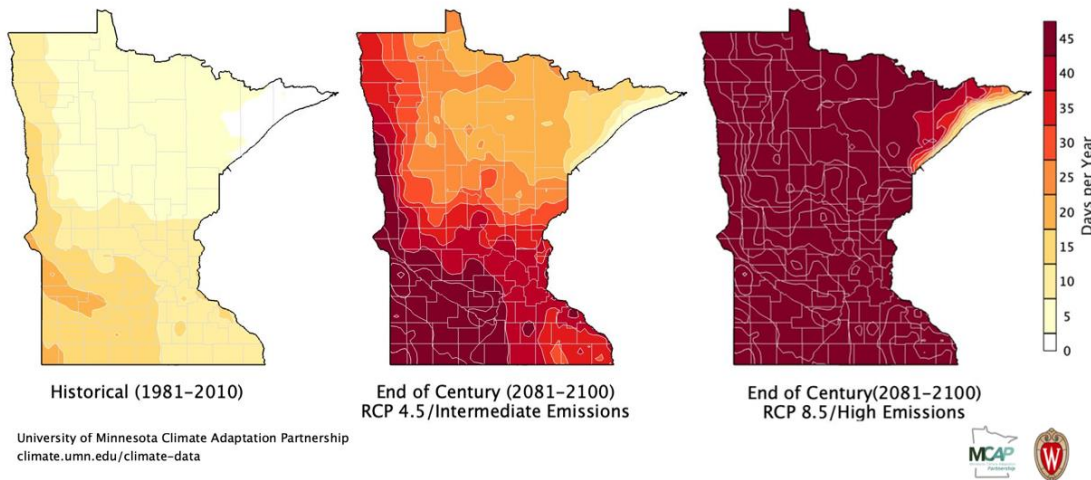
Recommendations:

1. Support city and DMC programs to improve transit (Link BRT) and micromobility.
2. Convert the UMR fleet to electric-hybrid.



Climate Projections

Days per Year Warmer than 90 degrees Fahrenheit

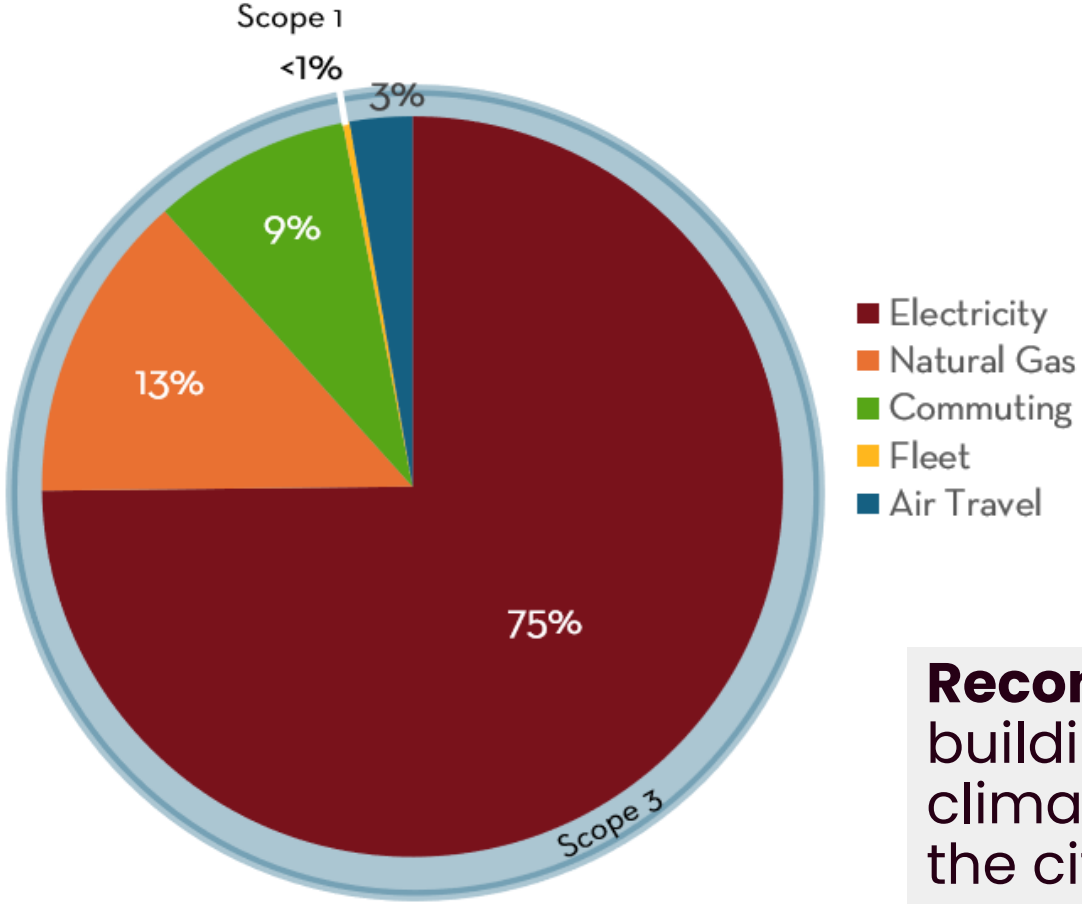


- Climate change is already occurring
- Possible climate change shifts based on moderate and high emission scenarios for mid century for Olmsted County:
 - The days per year of precipitation over 1" will increase from 6 to 7 days
 - The days above 90° F will shift from the historic rate of 10 days per year to between 25 to 30 per year
 - The change in annual maximum temperature will rise by 5° F to 6° F

Recommendation: Prepare the campus community and operations to be resilient against severe weather impacts.



Greenhouse Gas Emissions- Climate Impact



Estimated Baseline Emissions

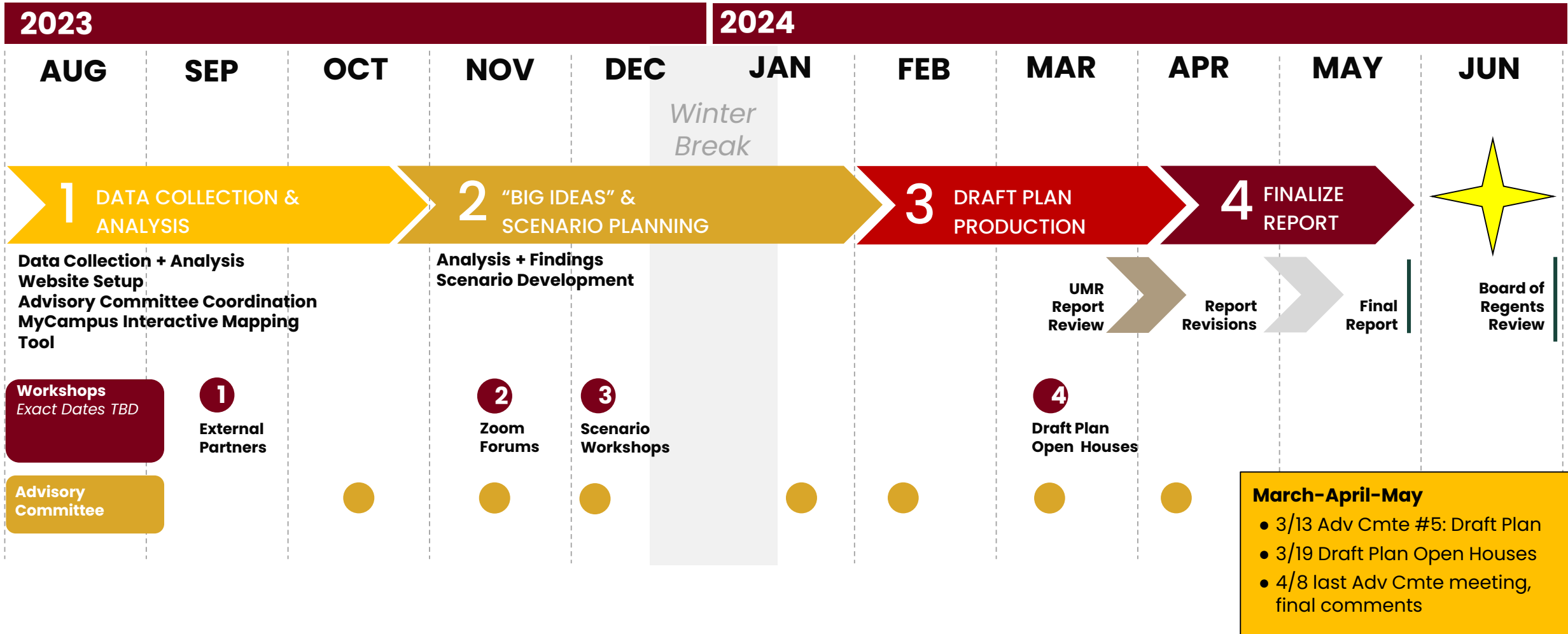
- UMR’s baseline emissions are approximately 3,269 MTCO2e*
- Electricity in Rochester is currently carbon intensive
- Most of UMR’s emissions are indirect emissions (Scope 3) and out of UMR’s direct control

Recommendation: Partner with utility providers, building owners, the City, and DMC to advance climate action goals. Connect leased space to the city’s TEN.

*metric tons of carbon dioxide-equivalent

Engagement

UMR Plan Development Schedule



**Schedule subject to change*

MyCampus: Selected Takeaways

1. Optimize interior spaces

2. Improve wayfinding within and between buildings

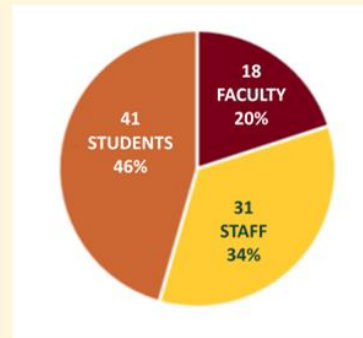
3. Skyways are important

4. Proximity to faculty and other buildings are priorities

5. Climate action (energy use, waste reduction, alternative transportation) is a priority

128
Responses

41 students
18 faculty
31 staff



1,068
map
points
placed



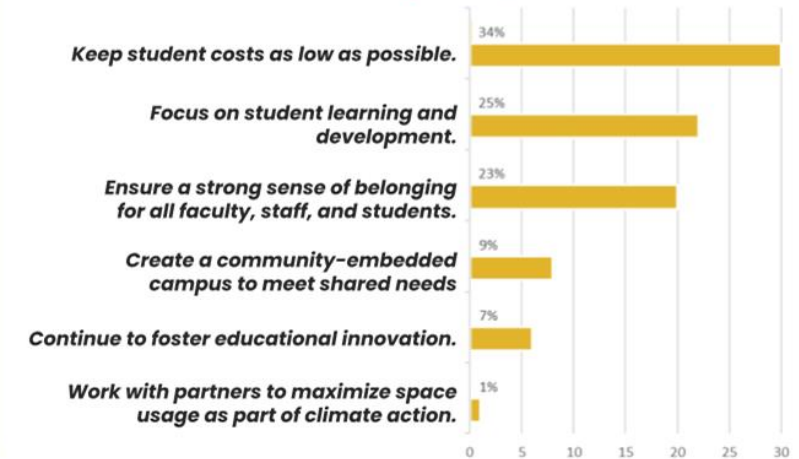
"This place is..."
256
map-based
comments



"In my experience..."
150
text
comments



What should the plan prioritize?



Comments from MyCampus: Fall 2023

“I LOVE studying at 318 because there are always faculty there to help me..”

“Peace Plaza having so many events and engaging displays is really nice to help the campus feel like it is part of the community.”

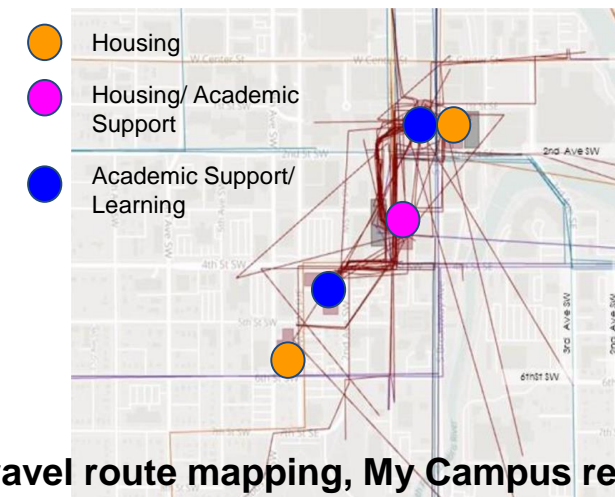
“I love the open space and that the building is shared with other biotech businesses and smart people that students can look up to as role models..”

“The commons area of University Square is probably the closest facsimile (to the heart of campus)”

“We interact with Mayo in many downtown locations – the subway, skyway and outside.”

“Spaces in University Square lack natural light and can feel very claustrophobic and beige. This has been improving with the addition of art on the walls and keeping on top of the lights getting replaced.”

“I love the light in the public spaces at the Student Life Center and how the windows in the dining space take advantage of the natural light.”



Travel route mapping, My Campus results

Dialogue and Discussion with UMR Partners

- Partners such as the City of Rochester, Mayo Clinic, and the Destination Medical Center have been fundamental parts of UMR since its earliest days and will continue to be so in the future.
- Many other partnerships with landlords, service providers, co-curricular instructors, and learners are also important contributors to success.
- The plan was informed by close to two dozen detailed meetings with specific partners and stakeholders.

Questions for our partners

1. Where do you see "quick win" partnership opportunities?
2. How can we collaborate to provide amenities or services for multiple stakeholder groups?
3. What partners (DMC, Mayo, others) are best poised to help deliver the proposed speciality spaces such as child care, VR simulation, micromobility, green leases?
4. What other educational needs could be addressed through partnerships? How could these partnerships contribute to collective educational outcomes?
5. What is the best way to deliver on partnerships? Task forces? Joint committees?

Two open houses attracted 50 participants at each event



Other Engagement

- Advisory Committee (6x)
- Open Houses (2x)
- Project Website (many)
- Informal Conversations (many)



Students engaged directly in the plan's development at open-house events

Big Idea #1: Create functional, healthy, and accessible UMR spaces.

On the way to the Bolder enrollment target, the plan calls for investments in UMR space that achieve the following goals. These recommendations consider creative ways of bringing existing spaces up to par, and ensuring new spaces have all the right components.

How important are these recommendations to you? Use a sticker to indicate your opinion.



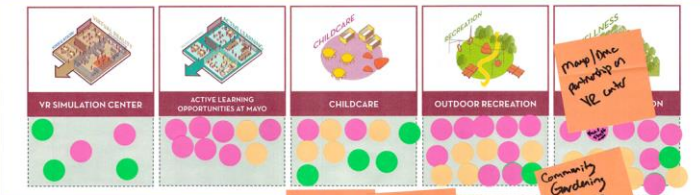
Which of these are most important to you? Add a post-it to share your thoughts on a post-it!



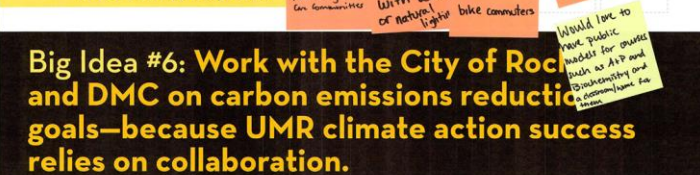
Big Idea #5: Work with partners to create shared, multi-use, speciality spaces in proximity to campus.

These would meet needs that UMR shares with various partners, and could be sponsored by DMC, other higher-education institutions, or third parties.

How important are these suggested speciality spaces to you? Use a sticker to share your top two.



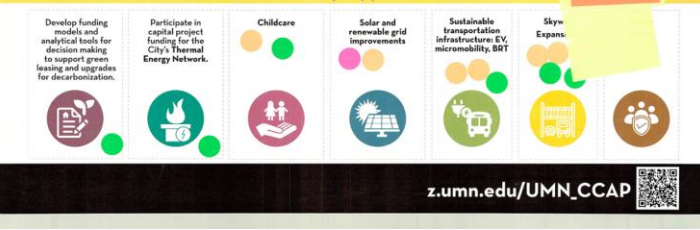
What other spaces would you like to see? Add a post-it!



Big Idea #6: Work with the City of Rock and DMC on carbon emissions reduction goals—because UMR climate action success relies on collaboration.

Support learning, programming, and thought leadership around funding opportunities for retrocommissioning and district energy. While leasing, UMR relies on partners to support Greenhouse Gas emission reduction goal collaborative approaches to consciousness raising and capacity building.

Partnership Opportunities



z.umn.edu/UMN_CCAP

Big Ideas

Integrating campus plans and climate action steps to shape the future



SUMMARY

NEAR

1. Create functional, healthy, and accessible UMR spaces.

NEAR

LONG

CLIMATE

6. Work with the City of Rochester and DMC on carbon emissions reduction goals—because UMR climate action success relies on collaboration.

NEAR

LONG

CLIMATE

2. Develop “Smart Lease” requirements to reach campus and climate action goals.

NEAR

LONG

CLIMATE

7. Reduce emissions from vehicular transportation and make sustainable commuting the easy choice.

NEAR

LONG

3. Plan for new UMR specialty spaces.

NEAR

LONG

CLIMATE

8. Continue to expand integration of climate action, climate resilience, and sustainability into UMR curriculum and co-curricular activities.

NEAR

LONG

CLIMATE

4. Develop in the Education District to support enrollment growth.

NEAR

LONG

5. Work with partners to create additional specialty spaces.

NEAR

LONG

CLIMATE

9. Advance climate and community resilience priorities on campus.

Big Idea #1: Create functional, healthy, and accessible UMR spaces to meet the growing campus needs.



1. Well-lit study spaces



2. Well-lit "living room"



3. Transparent walls for interior classrooms



5. New windows on Broadway Ave S.

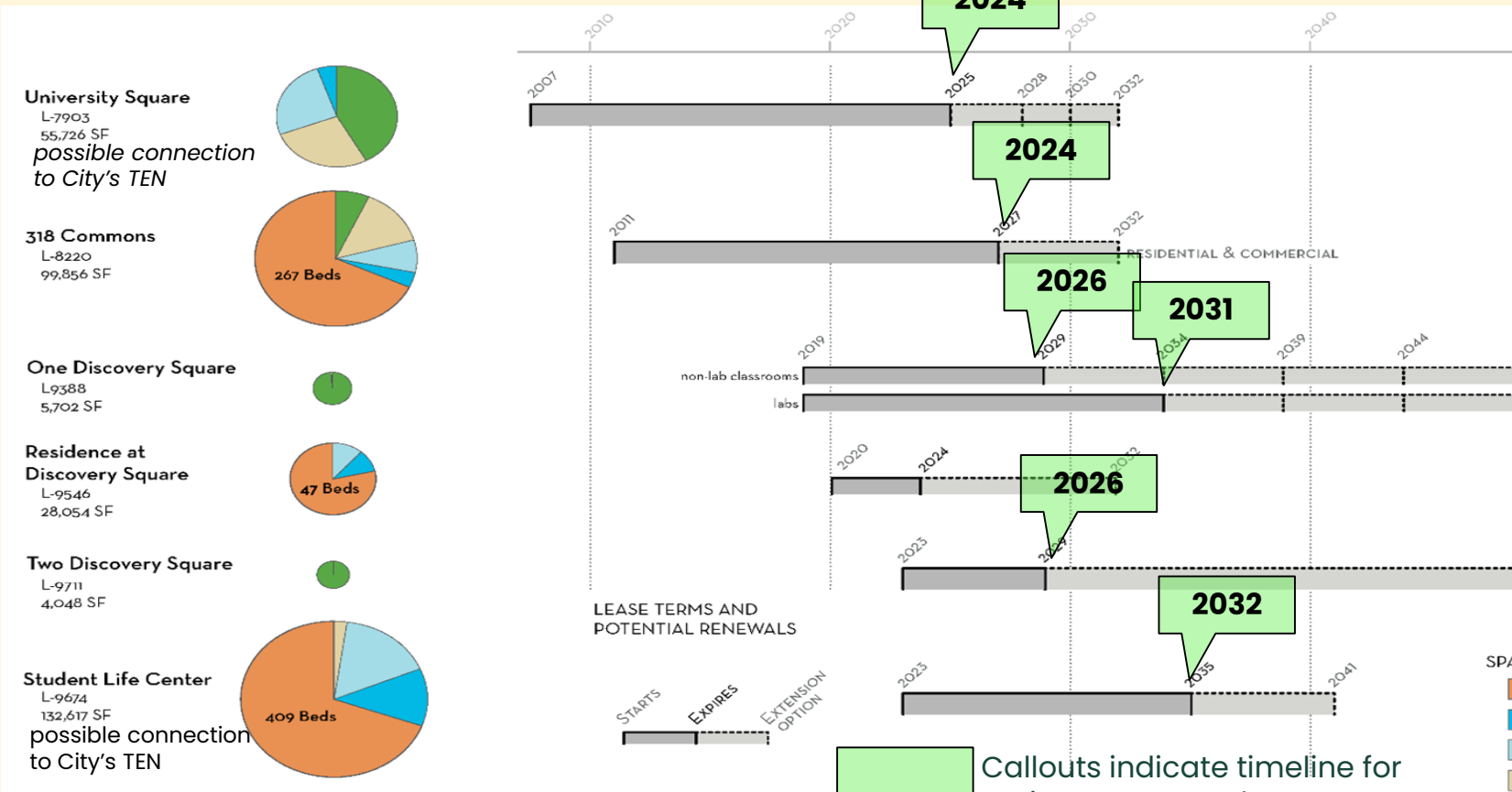


NEAR TERM

Big Idea #2: Develop "Smart Lease" requirements to reach campus and climate action goals.



NEAR TERM
LONG TERM
CLIMATE ACTION



University Square L-7903 55,726 SF <i>possible connection to City's TEN</i>	
318 Commons L-8220 99,856 SF	
One Discovery Square L-9388 5,702 SF	
Residence at Discovery Square L-9546 28,054 SF	
Two Discovery Square L-9711 4,048 SF	
Student Life Center L-9674 132,617 SF <i>possible connection to City's TEN</i>	

2034 Building Emissions Target

By 2034, UMR will reach a 96% carbon emissions reduction associated with current leased space, assuming Rochester Public Utilities (RPU) achieves their 2030 goal and green leases in decarbonized spaces are secured



Big Idea #3: Plan for new UMR specialty spaces.

There are several desirable specialty spaces not currently accounted for on campus. These spaces enrich campus life and play to the campus' strengths, bringing benefits to students, faculty, and staff.

1. Heart of the Campus

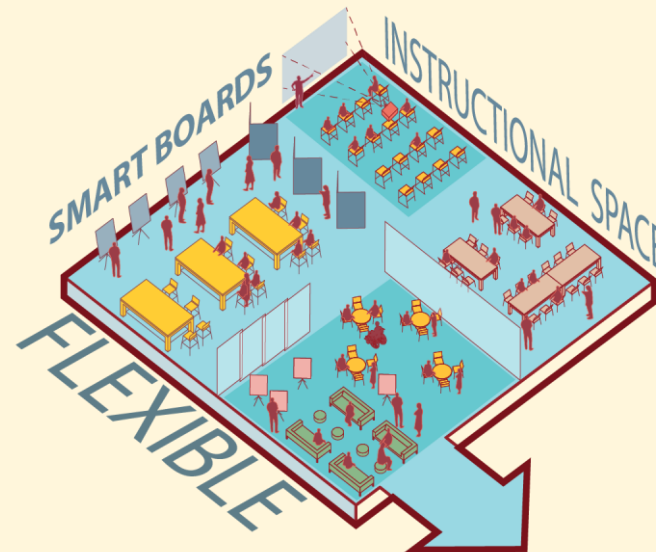
NEAR

LONG



2. Instructional Development Center

NEAR



3. Internship and Career Center

NEAR



NEAR TERM
LONG TERM



Big Idea #4: Develop in the Education District to support enrollment growth.

Indoor Space

- Create student housing and other academic/campus life spaces in the Education District as enrollment approaches 2,500.
- Maintain a strategic presence in downtown Rochester.
- Design buildings to B3 Guidelines and the SB 2030 Energy Standard to advance decarbonization goals

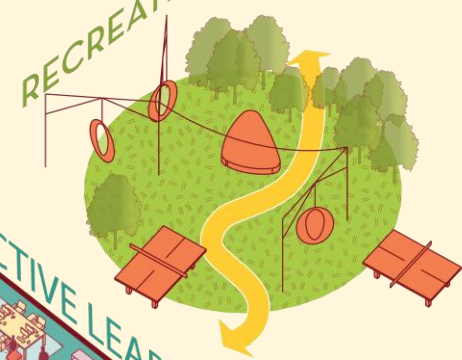
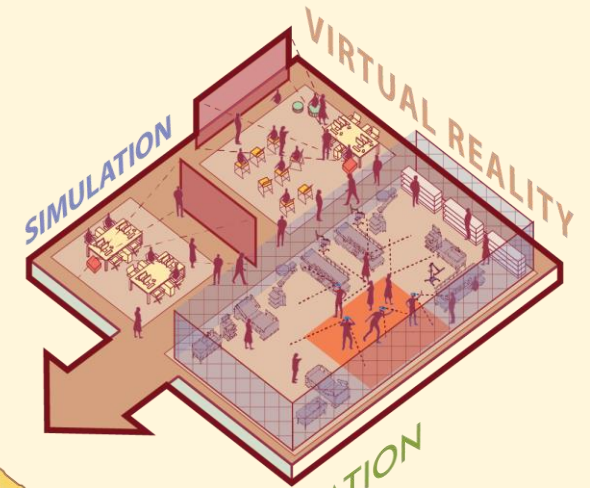
Outdoor Space

- Partner with the City Parks Department to extend river trails across the Education District to connect to the City's existing network.
- Create low-maintenance and accessible UMR outdoor recreation space as the District develops to support field-based activities and other options



Big Idea #5: Work with partners to create additional specialty spaces.

Some needs that are not currently addressed on campus are likely to need combined efforts to fund, develop and operate, and are essential to reach UMR's higher level of potential.



1. VR Simulation Center

NEAR

2. Active Learning Opportunities at Mayo

NEAR

3. Childcare

NEAR

4. Outdoor Recreation

NEAR LONG

5. Indoor Recreation

NEAR LONG

NEAR TERM
LONG TERM

Big Idea #6: Work with the City of Rochester and DMC on carbon emissions reduction goals—because UMR climate action success relies on collaboration.



Support learning, programming, development, and thought leadership around funding opportunities, green leases, carbon-free electricity, and district energy.

Both the City and DMC are well-equipped to support these goals because they share climate action and carbon emissions reduction goals.

Opportunities with DMC

Models and tools for green leasing, Inflation Reduction Act, building upgrades

Capital funding for the future Thermal Energy Network expansion and carbon free electricity

Sustainable transportation infrastructure: EV, micromobility, Link BRT



Big Idea #7: Reduce emissions from vehicular transportation and make sustainable commuting the easy choice.

- Take-home vehicles policy and procedures
- Support for living downtown
- Electric vehicle charging plans
- Educational campaigns
- Support City initiatives



2034 Commuting Emissions Target: Over 50% of employees and over 60% of students will commute by a mode other than car (bike, transit, walking)

2034 Fleet Emissions Target: All vehicles will be plug-in hybrid or battery electric





Big Idea #8: Continue to expand integration of climate action, climate resilience, and sustainability into UMR curriculum and co-curricular activities.

- Integrated 4 + 1 Master of Public Health in Environmental Health
- EcoliteracySCHOOL (Students Collaborating in Health-Oriented Outdoor Learning)
- Capstone
- Sustainable Living Learning Community



NEAR TERM

LONG TERM

CLIMATE ACTION

Big Idea #9: Advance climate and community resilience priorities on campus.

- Resilient building design standards
- Reduce water usage
- Equitable food access
- Access to physical and mental healthcare
- Incorporate into Culture of Safety Plan
- Align with City of Rochester's Plans
- Setup 3-stream waste system
- Effective public transportation
- Education and outreach



Implementation and Phasing

Immediate Actions, Next 3 years: Campus Plan

- Campus Life
 - Heart of the Campus
 - Internship and Career Center
 - Academic House
- Instructional Development Center
- Learning spaces (classrooms and labs)
- Faculty and staff office needs

Partnership Initiatives






- Immersion Learning Lab
- Recreation- indoor gym and outdoor
- Childcare
- Wayfinding/ campus safety



Immediate Actions, Near-Term: Climate Action Plan

- Decarbonization through green leasing terms and support for thermal energy infrastructure
- Shifting to zero carbon travel through commuting and other alternative mobility options
- Expand resilience planning for community, infrastructure, and the environment

85% GHG Emissions Reduction by 2034

-  Rochester Public Utility provides **100% carbon-free electricity**
-  UMR **leases zero emissions spaces** on all expired agreements
-  Over 50% of employees and 60% of students will **commute by bike, on foot, transit, or carpool**. **Electric vehicle adoption** rates will increase to 10% for employees and 5% for students
-  The entire UMR fleet will be **battery electric or plug-in hybrid electric**
-  A **mission-driven carbon offsets program** for University sponsored travel will be established systemwide

Emissions Reduction 2034-2050

- Lease or build zero emission space
- Make sustainable commuting the easy choice
- All- electric campus fleet
- Purchase carbon offsets and flights with sustainable aviation fuel; deploy strategies to reduce emissions

UMR Campus and Climate Action Plan

- 'Season of Unprecedented Opportunity' in Rochester
- A measured, realistic, future-forward plan for a unique campus.
- True to innovation Vision - a flexible plan for the University's start-up campus.





UNIVERSITY OF MINNESOTA

Driven to Discover®

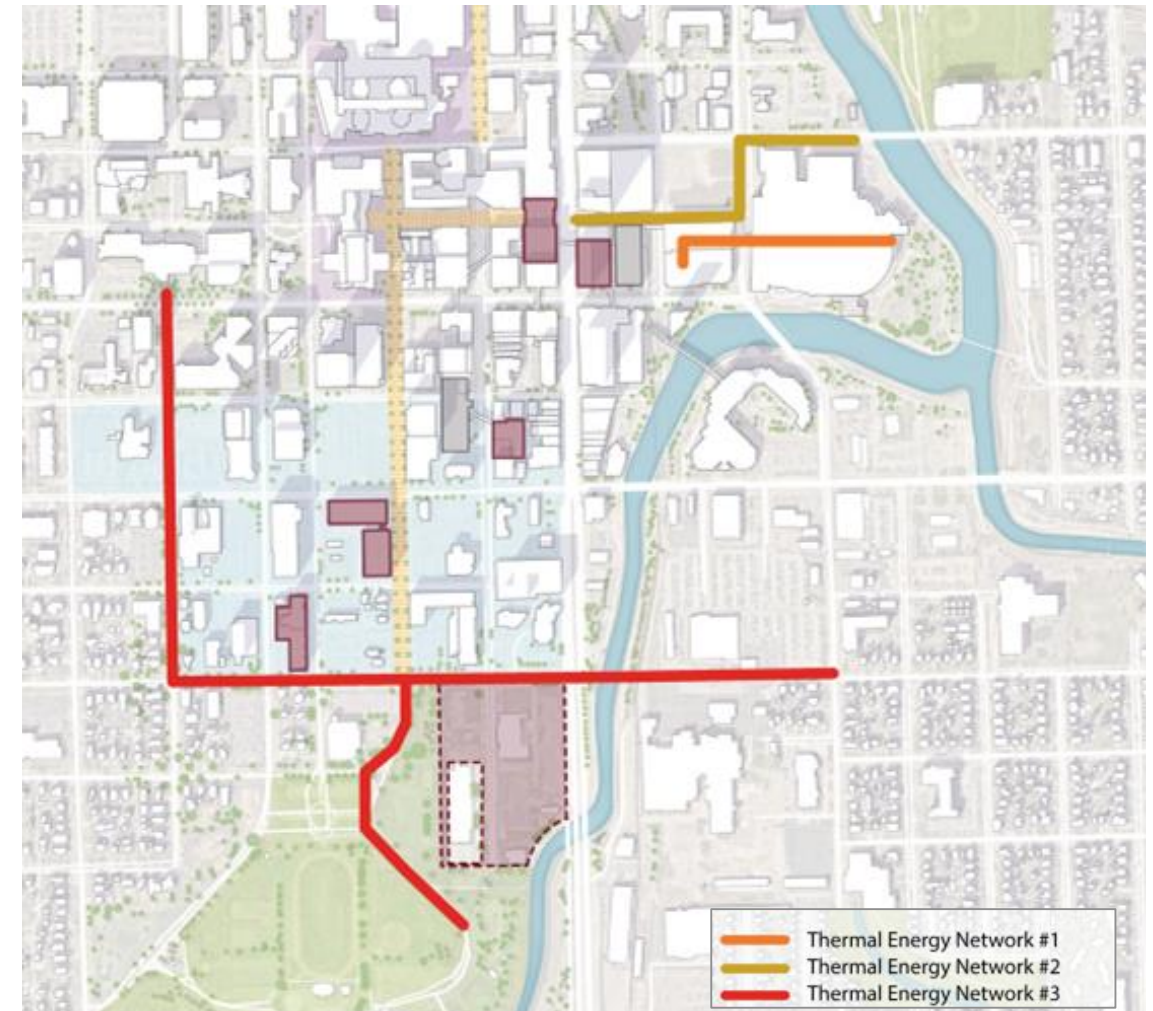
Crookston Duluth Morris Rochester Twin Cities

The University of Minnesota is an equal opportunity educator and employer.

Appendix

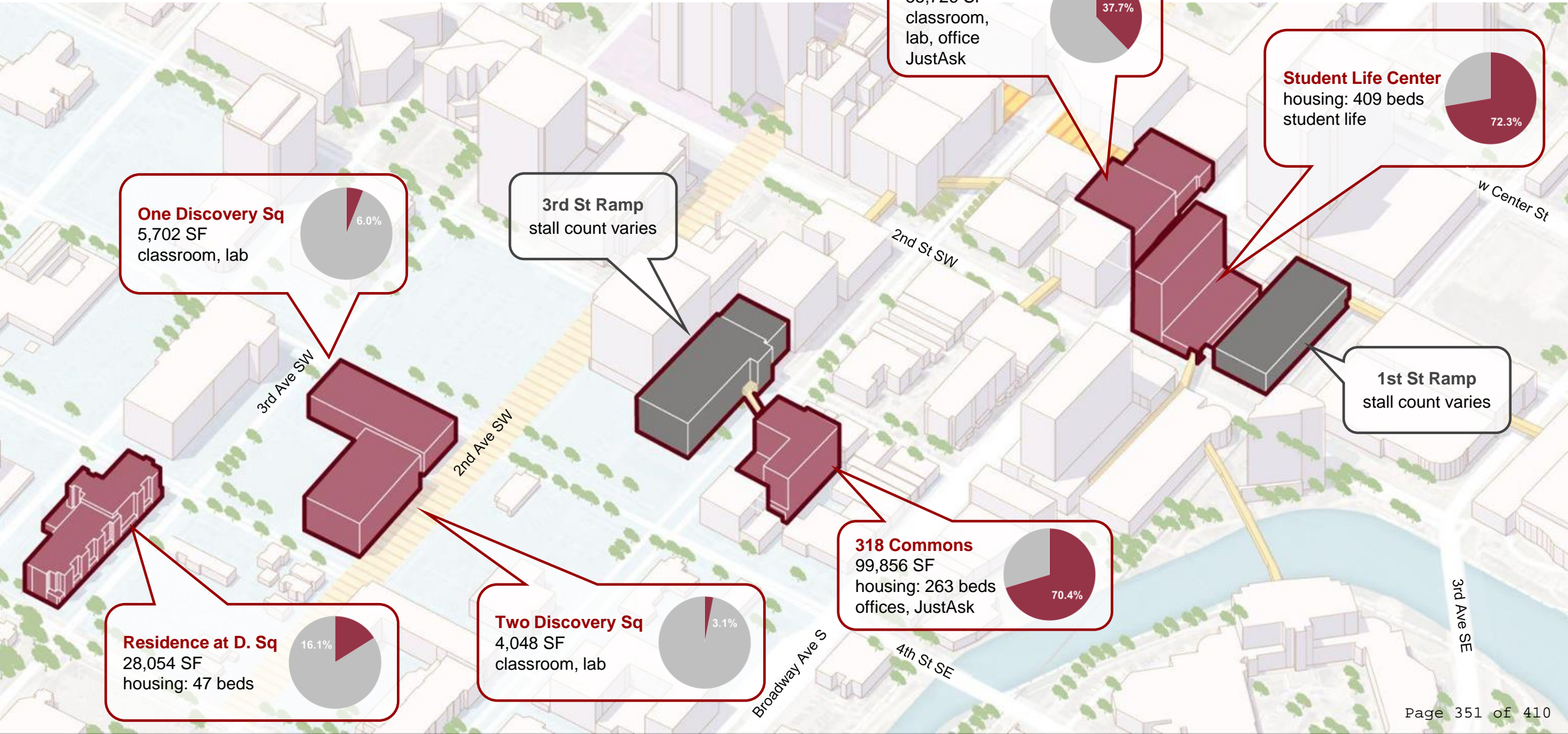
City thermal energy network (TEN)

- Renewable, geothermal heating and cooling
- Will be critical to achieving carbon-neutrality in leased spaces
- Pilot phase at Government Center
- Intended to serve public and private buildings including University Square
- DMC support is anticipated for funding and technical resources
- City & DMC request a letter of general support from UMN
- Student Life Center heating is electrified, but natural gas, therefore a lower priority to connect to TEN
- TEN uses Darcy wells, a technology developed by U of M that encumbers less land than traditional geothermal





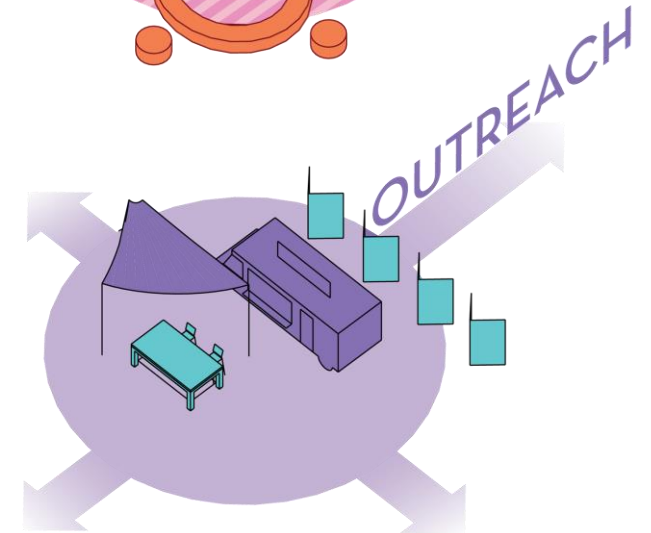
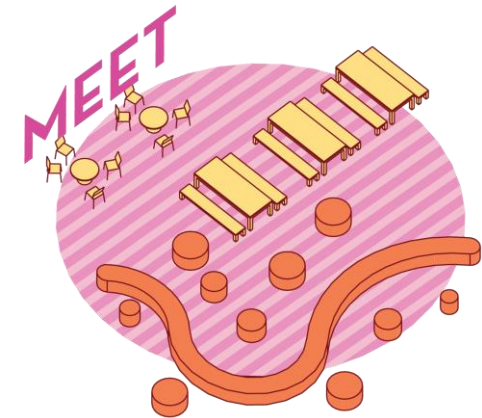
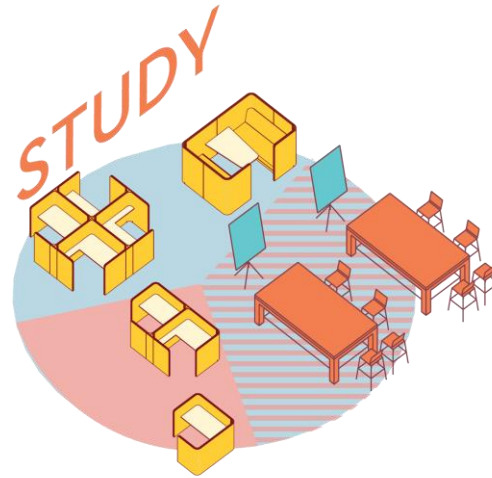
UMR Leased Spaces



A well-functioning Academic House (JustAsk) space includes a variety of functions and features:

An Academic House is:

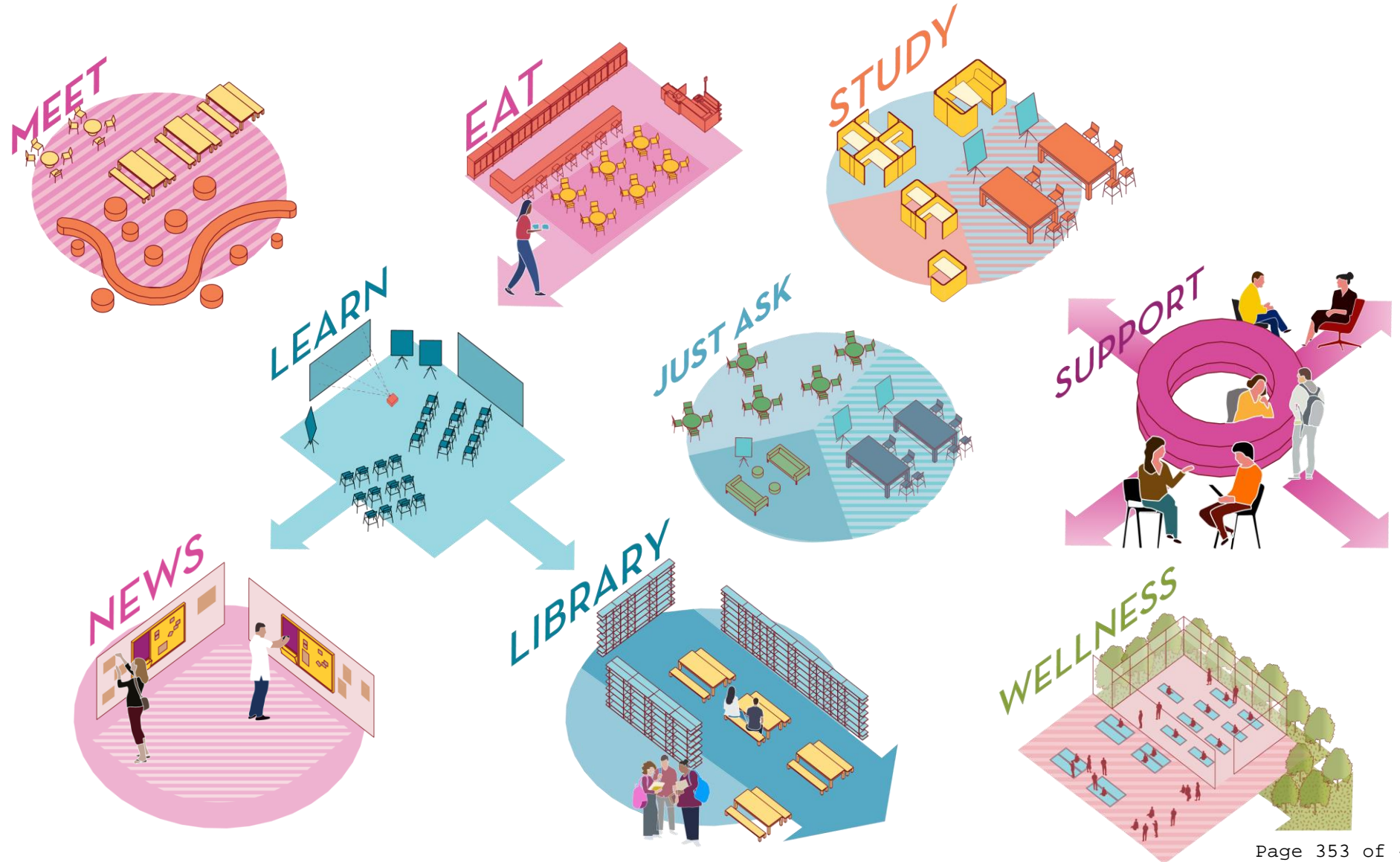
Focused
Bright
Flexible
Collaborative
Accessible
Friendly/Relaxed



A clear “Heart of the Campus” space includes a variety of functions and features:

The “Heart of the Campus” is:

Distinctly UMR
Bustling
Welcoming
Social
Connected
Open
Quality
Focused





BOARD OF REGENTS DOCKET ITEM SUMMARY

Finance & Operations

June 13, 2024

AGENDA ITEM: Consent Report

Review

Review + Action

Action

Discussion

This is a report required by Board policy.

PRESENTERS: Julie Tonneson, Interim Senior Vice President and Budget Director

PURPOSE & KEY POINTS

Board Approval Thresholds – Updates and Corrections

The purpose of this item is to make updates based on the newly adopted thresholds in Board of Regents Policy: *Reservation and Delegation of Authority*.

Biennial Competitive Threshold Approval

Board of Regents Policy: *Purchasing*, Section II, Subd. 1 requires that purchasing bid thresholds be determined by the administration and reviewed and approved by the Board biennially. Bid thresholds are used to specify when a formal, competitive bidding process must be used. The thresholds are determined based on several factors, including financial and reputational risk, the volume and materiality of purchases, efficiency and effectiveness, compliance requirements, and other factors relating to institutional goals and objectives. These thresholds balance the goal of using competitive processes to achieve the best value for the University against the administrative burden of conducting a competitive process for each purchase.

The current bid threshold for the purchase of goods and services is set at \$50,000; construction services, excluding architects and engineers, are set at \$250,000; and construction purchases for architects and engineers are set at \$100,000.

The administration recommends approval of the following changes to the current bid thresholds:

- Goods and Services: Increase from \$50,000 to \$100,000
- Construction Purchases: Increase from \$250,000 to \$500,000
- Architects and Engineers (related to construction): Increase from \$100,000 to \$200,000

If approved, the change in the bid thresholds would be implemented following the development of a comprehensive plan that would include process changes and improvements, training,

change management, and broad communication across the University. Additional information is included in the docket.

Changes to LLC Operating Agreements

The current operating agreements for the 2515 University Avenue SE LLC, the 325 -14th Avenue SE LLC, and the 2407 University Investment LLC align with the previous Board approval thresholds. The recommended changes to those operating agreements would amend certain provisions included as Member Reserved Acts in the Operating Agreement requiring the approval of the Member to be consistent with, and to remain consistent with, the dollar thresholds reflected Board of Regents Policy: *Reservation and Delegation Authority*. The updated amendments are included in the docket.

Board Policy Technical Corrections

The following corrections will update the noted Board policies to align with the new approval thresholds:

[Board Operations and Agenda Guidelines](#), Section IV, Subd. 5:

annual strategic facilities and real estate report, which includes updates on the University's facilities condition assessment and space utilization, real estate transactions from the past fiscal year, and capital project management updates for projects in process that have been approved in the annual capital improvement budget and have a value equal to or greater than ~~\$1,000,000~~ \$5,000,000;

[Debt Transactions and Long-Term Capital Financing Program](#), Article II, Section I, Subd. 1, (e):

entering into capital lease transactions valued at ~~\$1,000,000~~ \$5,000,000 or greater that are not otherwise subject to Board approval under Board of Regents Policy: *Reservation and Delegation of Authority* or other Board policy.

[Debt Transactions and Long-Term Capital Financing Program](#), Article II, Section I, Subd. 3, (b):

entering into capital leases with a value up to ~~\$1,000,000~~ \$5,000,000;

Employment Agreements

The purpose of this item is to seek approval for the following employment agreements:

- William McGeeveran, Dean, Law School, Twin Cities campus
- Raj Singh, Vice Provost and Dean of Undergraduate Education, Twin Cities campus

Long-Term Capital Financing Program: Use of Proceeds

The purpose of this item is to seek approval to remove five projects from the list of those previously authorized to use Long-Term Capital Financing Program (LTCFP) proceeds and request authorization to add three capital projects to the list of projects authorized to use LTCFP proceeds. The specific projects and amounts are included in the docket.

Purchases of Goods and Services \$5,000,000 and Over

The purpose of this item is to seek approval for purchases of goods and services of \$5,000,000 and over.

- To Ever-Green Energy for an estimated \$3,452,000 for the operation and maintenance services for three heating and energy-generating plants for the Department of Energy Management on the Twin Cities campus for the period of November 16, 2024 through November 15, 2029, with an optional contract extension through November 16, 2034, for an additional \$3,960,000. The total estimated contract value, if all options are exercised, would be an estimated \$7,412,000. This approval authorizes both the base term and the additional optional contract extension. The funds for this purchase are coming from the Department of Energy Management budget. Ever-Green Energy was selected as the result of a competitive Request for Proposal (RFP) conducted by Purchasing Services. Three suppliers responded to the RFP and none were a targeted business.
- To Gopher Sports Properties, LLC and Gopher Sports Network, LLC (wholly-owned entities of Learfield Communications, LLC) for an amendment to the two existing Learfield multimedia rights agreements that (i) provides an additional \$2,000,000 of revenue during the remaining years under agreements from July 1, 2025 through June 30, 2027, and (ii) extends the agreements for a minimum of \$119,000,000 over a ten-year period from July 1, 2027 through June 30, 2037 for the multimedia rights of the Department of Intercollegiate Athletics on the Twin Cities campus. If approved, the amendment is proposed to be documented in the form of an amended and restated agreement that combines the two existing agreements and incorporates the amendment terms. See the enclosed documentation for the basis of supplier selection.
- To Rise and Shine and Partners LLC for \$15,000,000 for a master service agreement to meet marketing goals for University Relations and the University of Minnesota system through marketing services for the period of July 15, 2024 through June 30, 2029. The annual campaign will be funded in part through increased central reserves and O&M allocations and in part through a \$10,000,000 allocation provided by the University of Minnesota Foundation. Rise and Shine and Partners LLC was selected as the result of a competitive RFP conducted by Purchasing Services. 43 suppliers responded to the RFP and 11 were targeted businesses.
- To RMF Engineering, Inc., PC for an estimated \$5,400,000 to develop comprehensive energy and utility plans for the Crookston, Duluth, Morris, and Twin Cities campuses for the production and distribution of campus utilities and energy that will meet the University's utility needs while providing safe, reliable, and resilient operations. This purchase will be funded from the Facilities Management operating budget. RMF Engineering, Inc., PC was selected as the result of a competitive RFP conducted by Purchasing Services. Four suppliers responded to the RFP and two were targeted businesses.

BACKGROUND INFORMATION

Approvals are sought in compliance with Board of Regents Policy as follows:

- Competitive Thresholds: *Purchasing*, Section II, Subd. 1

- Employment Agreement: *Reservation and Delegation of Authority*, Article I, Section IV, Subd. 1.
- Long-Term Capital Financing: Debt Transactions and Long-Term Capital Financing, Article III, Section I, Subd. 1
- Purchase of Goods and Services \$5,000,000 and Over: *Reservation and Delegation of Authority*, Article I, Section VII, Subd. 6.

INTERIM PRESIDENT'S RECOMMENDATION

The Interim President recommends approval of the Consent Report.

**BOARD OF REGENTS
FINANCE & OPERATIONS COMMITTEE
BIENNIAL COMPETITIVE THRESHOLD APPROVAL
June 13, 2024**

The purpose of this item is to recommend increases in the thresholds at which a formal bid or request for proposal (RFP) is required as follows: for goods and services from \$100,000 to \$200,000; for construction purchases (excluding architects and engineers) from \$250,000 to \$500,000; and for architects and engineers from \$100,000 to \$200,000.

Background

It is a well-established principle in both public and private organizations that competition among vendors is the best way to ensure that goods and services are procured at the lowest possible price. However, the amount of formality and rigor that is built into purchasing processes can have a significant impact on the efficiency and cost-effectiveness of procurement activities. For this reason, the University's purchasing policies and procedures are risk-based, using dollar thresholds to determine the materiality level at which more rigorous, formal (and costly) competitive processes will be required. Thresholds are determined based on several factors, including financial and reputational risk, the volume and materiality of purchases, efficiency and effectiveness, and compliance requirements and considerations.

Board of Regents Purchasing Policy states, "Except as provided in this policy, vendors shall be selected by a competitive process for purchases above a dollar threshold determined by the administration. This threshold shall be reviewed and approved by the Board biennially." The purpose of this report is to provide information for the Board to conduct its biennial review and approval of those purchasing thresholds.

It is important to note that below the dollar thresholds marking when formal competitive procedures are required, all departments are still required to use fewer formal procedures to help determine and document the reasonableness and economy of the prices paid and value received for any purchase. Examples of less formal procedures departments use include obtaining multiple informal quotes, references to vendors' catalogs or published prices, comparison of quotes to the prices paid under previous contracts that went through formal bids, and so forth. These requirements would not change if the recommended thresholds were approved. If approved, the change in the bid thresholds would be implemented following the development of a comprehensive plan that would include process changes/improvements, training, change management, and broad communication across the university.

Categories of Purchasing Activities

For purposes of establishing purchasing policies, procedures, thresholds, and other internal controls, purchasing activities are broken into three broad categories. They are:

- purchases of goods and services;
- construction purchases, excluding architects and engineers; and
- purchases of construction architects and engineers.

This information sets forth the recommended changes to the purchasing bid thresholds.

Goods and Services

The current bid threshold for goods and services is set at \$50,000 and has not been changed since 2007. Based on our analysis of purchasing and payment data, we recommend increasing the bid threshold to \$100,000. From a risk perspective, this increase would result in minimal additional financial or compliance risk because there are a very high number of low-dollar purchasing transactions (i.e., the average dollar value of the purchases occurring between the current threshold and the proposed threshold is about \$64,000). Additionally, approximately 89% of purchasing activity (based on dollars) would continue to use the formal bidding procedures.

Purchase Thresholds	Estimated # of Transactions	% of Transactions	Estimated Value of Purchases	% of Dollars
\$50,000-\$99,999	500	67%	\$32,000,000	11%
\$100,000 and above	1,000	33%	\$270,000,000	89%

Construction Purchases, Excluding Architects and Engineers (A & E)

The current bid threshold is set at \$250,000 and has not been changed since 2007. Our recommendation is to increase this threshold to \$500,000. The rationale for this increase is based on the overall risk of the construction activity that would no longer be formally bid on. The total number of construction purchases, the total dollar value, and the average dollar value of the purchases occurring between the current threshold and the proposed threshold (\$366,000 per purchase) are relatively small. Additionally, approximately 97% of construction activity (based on dollars) would continue to use formal bidding procedures.

Purchase Thresholds	Estimated # of Transactions	% of Transactions	Estimated Value of Purchases	% of Dollars
\$250,000-\$499,999	12	73%	\$4,000,000	3%
\$500,000 and above	32	27%	\$135,000,000	97%

Construction Purchases for Architects and Engineers (A&E)

The current bid threshold for this category of purchasing is \$100,000. We are recommending increasing the threshold to \$200,000. The rationale for the change is again based on materiality and the overall risk profile for this type of activity. The change would result in a very small increase in both the number and dollar amount of A & E purchases that would not be required to use a formal bid process, while approximately 96% of all A & E purchases (based on dollar value) would continue to use a formal bid process.

Purchase Thresholds	Estimated # of Transactions	% of Transactions	Estimated Value of Purchases	% of Dollars
\$100,000-\$199,999	10	58%	\$1,000,000	4%
\$200,000 and above	14	42%	\$26,000,000	96%

**First Amendment to Operating Agreement of
2515 University Avenue SE LLC**

This First Amendment to Operating Agreement of 2515 University Avenue SE LLC (this “**Amendment**”) is made by and between 2515 University Avenue SE LLC, a Minnesota limited liability company organized pursuant to the Act (the “**Company**”), and Regents of the University of Minnesota, a Minnesota constitutional corporation and sole member of the Company (“**Member**”), effective as of _____, 2024.

RECITALS

A. The Company and Member entered into an Operating Agreement of the Company effective May 20, 2019 (the “**Operating Agreement**”) that, among other things, governs the activities of the Company and sets forth its management structure.

B. The parties desire to amend certain provisions included as Member Reserved Acts in the Operating Agreement requiring the approval of the Member to be consistent with the dollar thresholds reflected in the Reservation and Delegation of Authority policy of the Board of Regents.

AGREEMENTS

In consideration of the mutual covenants and agreements contained in this Amendment, the Company and Member agree that the Operating Agreement is hereby amended as follows:

1. Definitions. Capitalized terms not otherwise defined in this Amendment will have the same meanings given to them in the Operating Agreement.

2. Member Reserved Acts. The following subsections of Section 4.6 (Member Reserved Acts) in the Operating Agreement are deleted in their entirety and restated as follows:

2.1 4.6 (k) enter into an agreement to purchase goods or services with a value of \$5,000,000 or more or a value anticipated to be \$5,000,000 or more; enter into any amendment to such an agreement previously approved by the Member when the amendment will increase the value of the agreement by 30% or more; or continue the performance of an agreement to purchase goods or services not previously approved by the Member when the value increases to \$5,000,000 or more. For purposes of this subsection, value shall include both the agreement’s base term and any optional agreement extensions.

2.2. The following subsections shall be added as subsections 4.6(n) and 4.6(o) and the existing section 4.6(n) shall become 4.6(p).

(i) 4.6(n) lease as tenant real or personal property or obtain easements or other interests in real property from such a Person if the initial term amount to be paid by the Company is (a) \$1,000,000 or more in rent in any year; (b) if the lease term exceeds 10 years; or (c) if the value is \$5,000,000 or more.

- (ii) 4.3(o) lease as landlord or grant easements or other interests in all or substantially all the real property owned, leased, or otherwise controlled by the Company to such a Person if the initial term amount to be paid to the Company is (a) \$1,000,000 or more in rent in any year; (b) if the lease term exceeds 10 years; or (c) if the value is \$5,000,000 or more.

3. Amendments to Board of Regents Policy. If the Board of Regents amends its Reservation and Delegation of Authority policy with respect to any of the dollar thresholds or conditions applicable to the Member Reserved Acts described in this Amendment, then this Amendment shall be automatically amended to be consistent with such updated dollar thresholds and/or conditions.

4. Full Force and Effect. Except with respect to the amendments this Amendment describes, the Operating Agreement is unchanged and remains in full force and effect.

Signatures on following page.

IN WITNESS WHEREOF, the parties hereto have executed this Amendment, effective as of the date first above written.

COMPANY:

2515 University Avenue SE LLC

By: _____

Name: Leslie Krueger

Title: President

MEMBER:

Regents of the University of Minnesota

By: _____

Name: Julie Tonneson

Title: Interim Senior Vice President for Finance and Operations

**First Amendment to Operating Agreement of
325 - 14th Avenue SE LLC**

This First Amendment to Operating Agreement of 325 – 14th Avenue SE LLC (this “**Amendment**”) is made by and between 325 – 14th Avenue SE LLC, a Minnesota limited liability company organized pursuant to the Act (the “**Company**”), and Regents of the University of Minnesota, a Minnesota constitutional corporation and sole member of the Company (“**Member**”), effective as of _____, 2024.

RECITALS

A. The Company and Member entered into an Operating Agreement of the Company effective January 11, 2023 (the “**Operating Agreement**”) that, among other things, governs the activities of the Company and sets forth its management structure.

B. The parties desire to amend certain provisions included as Member Reserved Acts in the Operating Agreement requiring the approval of the Member to be consistent with the dollar thresholds reflected in the Reservation and Delegation of Authority policy of the Board of Regents.

AGREEMENTS

In consideration of the mutual covenants and agreements contained in this Amendment, the Company and Member agree that the Operating Agreement is hereby amended as follows:

1. Definitions. Capitalized terms not otherwise defined in this Amendment will have the same meanings given to them in the Operating Agreement.

2. Member Reserved Acts. The following subsections of Section 4.3 (Member Reserved Acts) in the Operating Agreement are deleted in their entirety and restated as follows:

2.1 4.3(k) enter into an agreement to purchase goods or services with a value of \$5,000,000 or more or a value anticipated to be \$5,000,000 or more; enter into any amendment to such an agreement previously approved by the Member when the amendment will increase the value of the agreement by 30% or more; or continue the performance of an agreement to purchase goods or services not previously approved by the Member when the value increases to \$5,000,000 or more. For purposes of this subsection, value shall include both the agreement’s base term and any optional agreement extensions.

2.2. 4.3(m) lease as tenant real or personal property or obtain easements or other interests in real property from such a Person if the initial term amount to be paid by the Company is (a) \$1,000,000 or more in rent in any year; (b) if the lease term exceeds 10 years; or (c) if the value is \$5,000,000 or more.

2.3 4.3(n) lease as landlord or grant easements or other interests in all or substantially all the real property owned, leased, or otherwise controlled by the Company to such a

Person if the initial term amount to be paid to the Company is (a) \$1,000,000 or more in rent in any year; (b) if the lease term exceeds 10 years; or (c) if the value is \$5,000,000 or more.

3. Amendments to Board of Regents Policy. If the Board of Regents amends its Reservation and Delegation of Authority policy with respect to any of the dollar thresholds or conditions applicable to the Member Reserved Acts described in this Amendment, then this Amendment shall be automatically amended to be consistent with such updated dollar thresholds and/or conditions.

4. Full Force and Effect. Except with respect to the amendments this Amendment describes, the Operating Agreement is unchanged and remains in full force and effect.

Signatures on following page.

IN WITNESS WHEREOF, the parties hereto have executed this Amendment, effective as of the date first above written.

COMPANY:

325 - 14th Avenue SE LLC

By: _____

Name: Leslie Krueger

Title: President

MEMBER:

Regents of the University of Minnesota

By: _____

Name: Julie Tonneson

Title: Interim Senior Vice President for Finance and Operations

**First Amendment to Amended and Restated Operating Agreement of
2407 University Investment LLC**

This First Amendment to Amended and Restated Operating Agreement of 2407 University Investment LLC (this “**Amendment**”) is made by and between 2407 University Investment LLC, a Minnesota limited liability company organized pursuant to the Act (the “**Company**”), and Regents of the University of Minnesota, a Minnesota constitutional corporation and sole member of the Company (“**Member**”), effective as of _____, 2024.

RECITALS

A. The Company and Member entered into an Amended and Restated Operating Agreement of the Company effective October 20, 2022 (the “**Operating Agreement**”) that, among other things, governs the activities of the Company and sets forth its management structure.

B. The parties desire to amend certain provisions included as Member Reserved Acts in the Operating Agreement requiring the approval of the Member to be consistent with the dollar thresholds reflected in the Reservation and Delegation of Authority policy of the Board of Regents.

AGREEMENTS

In consideration of the mutual covenants and agreements contained in this Amendment, the Company and Member agree that the Operating Agreement is hereby amended as follows:

1. Definitions. Capitalized terms not otherwise defined in this Amendment will have the same meanings given to them in the Operating Agreement.

2. Member Reserved Acts. The following subsections of Section 4.3 (Member Reserved Acts) in the Operating Agreement are deleted in their entirety and restated as follows:

2.1 4.3(k) enter into an agreement to purchase goods or services with a value of \$5,000,000 or more or a value anticipated to be \$5,000,000 or more; enter into any amendment to such an agreement previously approved by the Member when the amendment will increase the value of the agreement by 30% or more; or continue the performance of an agreement to purchase goods or services not previously approved by the Member when the value increases to \$5,000,000 or more. For purposes of this subsection, value shall include both the agreement’s base term and any optional agreement extensions.

2.2. 4.3(m) lease as tenant real or personal property or obtain easements or other interests in real property from such a Person if the initial term amount to be paid by the Company is (a) \$1,000,000 or more in rent in any year; (b) if the lease term exceeds 10 years; or (c) if the value is \$5,000,000 or more.

2.3 4.3(n) lease as landlord or grant easements or other interests in all or substantially all the real property owned, leased, or otherwise controlled by the Company to such a

Person if the initial term amount to be paid to the Company is (a) \$1,000,000 or more in rent in any year; (b) if the lease term exceeds 10 years; or (c) if the value is \$5,000,000 or more.

3. Amendments to Board of Regents Policy. If the Board of Regents amends its Reservation and Delegation of Authority policy with respect to any of the dollar thresholds or conditions applicable to the Member Reserved Acts described in this Amendment, then this Amendment shall be automatically amended to be consistent with such updated dollar thresholds and/or conditions.

4. Full Force and Effect. Except with respect to the amendments this Amendment describes, the Operating Agreement is unchanged and remains in full force and effect.

Signatures on following page.

IN WITNESS WHEREOF, the parties hereto have executed this Amendment, effective as of the date first above written.

COMPANY:

2407 University Investment LLC

By: _____

Name: Leslie Krueger

Title: President

MEMBER:

Regents of the University of Minnesota

By: _____

Name: Julie Tonneson

Title: Interim Senior Vice President for Finance and Operations

Finance & Operations Committee
Consent Report
June 13, 2024

Personnel Appointment

Pending approval by the Board of Regents, William McGeveran will be appointed dean of the University of Minnesota Law School, effective June 17, 2024.

Position Overview

As dean of the Law School (Minnesota Law), William McGeveran will report to the executive vice president and provost and will serve as the school's chief administrative and academic officer, managing a school of more than 700 students, 65 full-time faculty, 234 adjunct faculty, 85 staff members, and an operating budget of over \$37 million.

The dean provides collaborative leadership to maintain and enhance the Law School's excellence as one of the country's preeminent public law schools. The Law School is currently ranked 16th nationally in U.S. News & World Report and 5th among public university law schools. Known for its outstanding students, influential faculty-scholars, exceptional clinical programs, commitment to diversity, equity, and inclusion, global perspective, and support for interdisciplinary study, Minnesota Law draws talent nationally and internationally.

Driven by its strategic priorities, Minnesota Law seeks to attract an outstanding and diverse student body; promote curricular innovation; provide professional opportunities for students; leverage local, national, and international relationships; and support and grow a world-class faculty. Over the past several years, the Law School has demonstrated a record of financial stability, strong fundraising capabilities, increased diversity in the faculty and student body, and successful career outcomes for students.

The dean is tasked with: ensuring that the Law School remains financially sound and continues to attract robust philanthropic support; serving as a collaborator and relationship builder within the University and across the Twin Cities and national communities; supporting and building an outstanding student body and faculty; sustaining the Law School's commitment to diversity, equity, and inclusion; and positioning the Law School to meet the evolving challenges facing legal education and the legal profession. The dean also represents the Law School in University-level discussions and strategic initiatives and works with other collegiate deans and system leaders to advance the mission of the University.

Appointee's Background and Qualifications

William McGeveran brings a wealth of experience and leadership to the role, with background in legal academia and a passion for shaping the future of legal education. He has been a member of the Law School faculty since 2006, served as Associate Dean for Academic Affairs from 2018-2022 and as the School's interim dean since July 2023. In these roles, he has been instrumental in shaping the School's innovative curriculum, clinical and experiential learning opportunities, and scholarly and academic strengths as one of the country's preeminent public law schools. Bill is an internationally recognized scholar of data privacy law, intellectual property, digital technology, and free speech.

McGeveran earned his J.D., magna cum laude, from New York University and a B.A., magna cum laude, in political science from Carleton College. Before coming to the Law School, he was a resident

fellow at the Berkman Center for Internet and Society at Harvard Law School. Previously, he worked as an intellectual property litigator, clerked for Judge Sandra Lynch on the U.S. Court of Appeals for the First Circuit, and served as an aide to then-congressman Chuck Schumer.

Recommended Salary and Appointment Type

William McGeveran's annual salary as dean of the Law School will be \$385,000. His appointment as dean is a 100-percent time, 12-month L appointment in the professional and academic personnel classification who serves as an at-will employee at the pleasure of the Executive Vice President and Provost. The full employment agreement between the University of Minnesota and William McGeveran is attached as an exhibit.

There are no individually negotiated terms of employment or separation agreements.

Comparable Market Data

Benchmarking with the University's Annual Review of Senior Leader Compensation, which was presented to the Board of Regents in May, shows comparative base salary data among University of Minnesota peers for the position of Dean, Law. The report provides market data from the CUPA-HR Administrators in Higher Education Salary Survey and the CUPA-HR Executive Compensation and Benefits in Higher Education survey, encompassing a broad range of participant institutions that includes both public and private institutions. The Office of Human Resources has further detailed comparable market data for base compensation for this position aged to July 2024 for FY25, benchmarked among Twin Cities peer group institutions as follows:

10th percentile - \$346,333
25th percentile - \$396,471
50th percentile - \$440,275
75th percentile - \$479,513
90th percentile - \$585,697

Recommendation

The President recommends the appointment of William McGeveran to the position of dean of the Law School at the University of Minnesota.

EMPLOYMENT AGREEMENT

THIS EMPLOYMENT AGREEMENT is entered into as of this 13th day of May, 2024, by and between Regents of the University of Minnesota, a Minnesota constitutional educational corporation (the “University”), and William McGeveran (“William McGeveran,” “you”).

WHEREAS, the University wishes to employ William McGeveran as Dean of the Law School (Minnesota Law) and William McGeveran wishes to accept employment as Dean of the Law School (Minnesota Law);

WHEREAS, this Employment Agreement is subject to the approval of the Board of Regents of the University of Minnesota and the completion of a background check satisfactory to the University;

THEREFORE, the University and William McGeveran agree as follows, subject to the approval of the Board of Regents:

I. EMPLOYMENT TERM AND DUTIES

Subject to the terms and conditions of this Agreement and University Policies and Procedures, the University appoints William McGeveran as Dean of the Law School (Minnesota Law), and he agrees to be so employed by the University for a term commencing on June 17, 2024. The Dean of the Law School (Minnesota Law) is a 100-percent time, 12-month L appointment in the professional and academic personnel classification who serves as an at-will employee at the pleasure of the Executive Vice President and Provost. As such, you report to and serve at the pleasure of the Executive Vice President and Provost and your appointment may be terminated at any time without advance notification.

II. DUTIES

During the term of your employment as Dean of the Law School (Minnesota Law), you will diligently and consciously devote your full-time attention and best efforts in performing and discharging the duties of Dean of the Law School (Minnesota Law) as they are set forth in the job description for this position (attached) including, but not limited to, the following duties:

A. Serving as the chief academic and executive officer for the Law School (Minnesota Law); providing strategic and intellectual leadership and administrative oversight of, and accountability for, the educational, research, service, outreach and engagement activities of the Law School (Minnesota Law);

- B. Overseeing the responsible planning, stewardship, and management of fiscal, capital, and human resources of the Law School (Minnesota Law);
- C. Collaborating with faculty, students, and staff to create and sustain a unified vision for the School and to maintain and enhance the School's quality, reputation, stature, and goals;
- D. Providing leadership in, and aligning resources with, the recruitment and retention of excellent and diverse faculty, students, and staff;
- E. Promoting and fostering diversity, equity, and inclusion; promoting and strengthening access and success for underrepresented faculty, staff and students; and enhancing an open and inclusive environment within the School and across all School constituencies;
- F. Garnering support for the Law School (Minnesota Law) from both internal and external stakeholders;
- G. Leading efforts to secure philanthropic support and generate revenue for the School's academic mission;
- H. Enhancing community and industry partnerships and impact and promoting outreach efforts that engage the University and its partners appropriately in state, national, and international issues;
- I. Representing the Law School (Minnesota Law) in University-level discussions and strategic initiatives and working with other collegiate deans as a member of the Twin Cities Deans Council to advance the educational mission of the University and to develop joint educational and research activities;
- J. Performing such other duties as related to your employment position and assigned to you by your appointing authority.

III. PERFORMANCE

In accordance with University policy, you will receive regular annual performance evaluations and, in accordance with University Policy on Reviewing the Performance of Senior Leaders, you will receive a broader systemic review of your performance no later than the end of your third year in the position.

IV. FACULTY APPOINTMENT

In addition to your appointment as Dean of the Law School (Minnesota Law), you also hold an appointment as a tenured professor in the School. During the time you serve as Dean of the Law School (Minnesota Law), you will not receive any compensation for your faculty appointment, but a salary for this appointment will be established each year by the University, based on the average increase to base of your same-ranked collegiate peers. In the event you no longer are employed as Dean of the Law School (Minnesota Law), and retain this faculty appointment, this will be your established faculty salary.

V. COMPENSATION

A. Subject to the terms of this Agreement for all services provided by you on behalf of the University, the University shall pay you an annual salary of Three Hundred and Eighty-five thousand and No/100 Dollars (\$385,000).

B. All base salary shall be paid in accordance with the University's regular payroll procedures for Professional and Administrative employees and shall be subject to withholding for applicable federal and state income taxes, federal social security taxes, and other applicable taxes and deductions.

C. In accordance with University policies and procedures, you shall be eligible for salary increases on an annual basis based upon the evaluation of the appointing authority or his/her designee.

D. The base salary is subject to furloughs, pay freezes, salary reductions or other adjustments to the same extent they are required of other employees of the University.

VI. BENEFITS

The University shall provide you with a benefits program as provided generally for its Professional and Administrative employees as described in its policies and Procedures (<http://www.umn.edu/ohr/benefits/summary/>). These programs shall be subject to amendments and modifications by the University.

VII. SEPARATION

A. Your appointment as Dean of the Law School (Minnesota Law) is an L appointment, which means you serve at the pleasure of your appointing authority. Your appointment may be terminated without any required notice period.

B. In the event you are separated from your administrative position, you may be eligible for certain benefits provided by the University, in accordance with

University policy. Any exception from or waiver of University policy related to your separation must be approved by the Board of Regents.

C. At the end of your administrative appointment, you may return to the faculty at your established faculty salary.

VIII. UNIVERSITY POLICIES AND GENERAL CONDITIONS

A. Your appointment is subject to the University's policies and procedures that govern your position (<http://policy.umn.edu/>), which may be amended from time to time.

B. Amendment. Any amendment to this Agreement shall be in writing executed and delivered by the parties.

C. Parties In Interest/ Assignment. This Agreement shall be binding upon and the benefits and obligations provided for herein shall inure to the parties hereto and their respective heirs, legal representatives, successors, assigns, transferees or donees, as the case may be. No portion of this Agreement shall be assignable without the prior written consent of the other party.

D. Effect of Prior Agreements. This Agreement is intended by the parties as the final and binding expression of their contract and agreement and as the complete and exclusive statement of the terms thereof. This Agreement supersedes and revokes all prior negotiations, representations, and agreements, whether oral or written, relating to the subject matter hereof.

E. Enforceability. If any provision contained herein shall be deemed or declared unenforceable, invalid, or void, the same shall not impair any of the other provisions contained herein, which shall be enforced in accordance with their respective terms.

F. Construction. The headings preceding and labeling the sections of this Agreement are for the purpose of identification only and shall not in any event be employed or used for the purpose of construction or interpretation of any portion of this Agreement. No waiver by any party of any default or nonperformance hereunder shall be deemed a waiver of any subsequent default or nonperformance. As used herein and where necessary, the singular shall include the plural and vice versa, and masculine, feminine and gender neutral expressions shall be interchangeable.


IX. BOARD OF REGENTS APPROVAL

This agreement is subject to formal approval by the Board of Regents and shall not be binding or effective until such approval is given. This agreement is also subject to the completion of a background check that is satisfactory to the University.


IN WITNESS WHEREOF, the undersigned have caused this Agreement to be executed as of the date first shown above.

By: 
William McGeeveran

REGENTS OF THE UNIVERSITY OF MINNESOTA

By: 
Rachel T. A. Croson
Executive Vice President
and Provost

Approved as to Form and Execution

By: 
Douglas R. Peterson
General Counsel

Finance & Operations Committee
Consent Report
June 13, 2024

Personnel Appointment

Pending approval by the Board of Regents, Rajdeep (Raj) Singh will be appointed Vice Provost and Dean of Undergraduate Education, effective July 1, 2024.

Position Overview

As Vice Provost and Dean of Undergraduate Education, Raj Singh will report to the executive vice president and provost and will have primary responsibility for providing strategic vision, direction, and support for the undergraduate academic educational experience. He will oversee the central Office of Undergraduate Education, including curriculum administration, undergraduate policy, academic support resources, academic student success, undergraduate analytics, University Honors Program, student scholarship fundraising, and assessment of student learning.

The Vice Provost and Dean of Undergraduate Education will work in collaboration with leaders within freshman-admitting colleges, the Office of the President, Student Affairs, Equity and Diversity, system campus leaders, and others to advance strategic priorities that support the undergraduate educational experience, strengthen access and success for underrepresented students, and ensure the quality of undergraduate programs in alignment with University goals and accreditation standards. He will also oversee curricular and program review and approval processes, core curriculum redesign efforts, and undergraduate educational policies and processes.

The Vice Provost and Dean of Undergraduate Education ensures a high-quality undergraduate student academic experience by overseeing curricular and program review and approval processes, core curriculum redesign efforts, and undergraduate education policies and processes to maintain the quality of undergraduate programs in alignment with University goals and accreditation standards. The position will develop and implement strategies for continuous improvement of graduation and retention rates and other student success outcomes, foster collaboration among the undergraduate colleges, academic departments, faculty, and other university units to promote a cohesive undergraduate educational experience, promote and foster diversity, equity, and inclusion, and work to establish and lead an undergraduate financial aid and scholarship strategy with University leaders to leverage aid to students to ensure access and affordability and minimize student debt.

Appointee's Background and Qualifications

As a member of the Carlson School of Management faculty since 1999, Dr. Singh brings a wealth of experience to this role. He has held the endowed Arthur R. Upgren Professor of Finance position since 2010, chaired the Department of Finance from 2011 to 2015, and served as the School's associate dean for undergraduate programs from 2015 to 2021. Dr. Singh holds a Ph.D. and M.S. in Finance from Carnegie Mellon University, an MBA in Information Systems from Baruch College, and a B.Sc.(Honors) in Mechanical Engineering from Kurukshetra University, India.

Recommended Salary and Appointment Type

Raj Singh's annual salary as Vice Provost and Dean of Undergraduate Education will be \$441,000, which is equal to the same rate of pay as his 9-month Professor of Finance appointment in the Carlson School of Management, annualized on a 12-month basis.

His appointment as the Vice Provost and Dean of Undergraduate Education is a 100-percent time, 12-month L appointment in the professional and academic personnel classification who serves as an at-will employee at the pleasure of the Executive Vice President and Provost. The full employment agreement between the University of Minnesota and Raj Singh is attached as an exhibit.

There are no individually negotiated terms of employment or separation agreements.

Comparable Market Data

Benchmarking with the University's Annual Review of Senior Leader Compensation, which was presented to the Board of Regents in May, shows comparative base salary data among University of Minnesota peers for the position of dean, undergraduate programs. The report provides market data from the CUPA-HR Administrators in Higher Education Salary Survey and the CUPA-HR Executive Compensation and Benefits in Higher Education survey, encompassing a broad range of participant institutions that includes both public and private institutions. The Office of Human Resources has further detailed comparable market data for base compensation for this position aged to July 2024 for FY25, benchmarked among Twin Cities peer group institutions as follows:

10th percentile - \$218,019
25th percentile - \$257,924
50th percentile - \$303,944
75th percentile - \$368,146
90th percentile - \$464,552

Recommendation

The Interim President recommends the appointment of Rajdeep (Raj) Singh to the position of Vice Provost and Dean of Undergraduate Education at the University of Minnesota.

EMPLOYMENT AGREEMENT

THIS EMPLOYMENT AGREEMENT is entered into as of this 24th day of May, 2024, by and between Regents of the University of Minnesota, a Minnesota constitutional educational corporation (the “University”), and Rajdeep Singh (“Raj Singh,” “you”).

WHEREAS, the University wishes to employ Raj Singh as Vice Provost and Dean of Undergraduate Education and Raj Singh wishes to accept employment as Vice Provost and Dean of Undergraduate Education;

WHEREAS, this Employment Agreement is subject to the approval of the Board of Regents of the University of Minnesota and the completion of a background check satisfactory to the University;

THEREFORE, the University and Raj Singh agree as follows, subject to the approval of the Board of Regents:

I. EMPLOYMENT TERM AND DUTIES

Subject to the terms and conditions of this Agreement and University Policies and Procedures, the University appoints Raj Singh as Vice Provost and Dean of Undergraduate Education, and he agrees to be so employed by the University for a term commencing on July 1, 2024. The Vice Provost and Dean of Undergraduate Education is a 100-percent time, 12-month L appointment in the professional and academic personnel classification who serves as an at-will employee at the pleasure of the Executive Vice President and Provost. As such, you report to and serve at the pleasure of the Executive Vice President and Provost and your appointment may be terminated at any time without advance notification.

II. DUTIES

As Vice Provost and Dean of Undergraduate Education, you will diligently and consciously devote your full-time attention and best efforts in performing and discharging the duties of Vice Provost and Dean as they are set forth in the job description for this position, including, but not limited to, the following duties:

- A. Ensuring a high-quality undergraduate student academic experience by overseeing curricular and program review and approval processes, core curriculum redesign efforts, and undergraduate education policies and processes to ensure quality of undergraduate programs in alignment with University goals and accreditation standards.
- B. Developing and implementing strategies for continuous improvement of

graduation and retention rates and other student success outcomes.

- C. Fostering collaboration among the undergraduate colleges, academic departments, faculty and other university units to promote a cohesive undergraduate educational experience; communicate effectively with students, faculty, staff, and external stakeholders to ensure engagement and transparency.
- D. Promoting and fostering diversity, equity, and inclusion; promoting and strengthening access and success for underrepresented students and staff; and enhancing an open and inclusive environment as part of the undergraduate experience.
- E. Establishing and leading an undergraduate financial aid and scholarship strategy with University leaders to leverage aid to students to ensure access and affordability and minimize student debt; provide leadership and direction for new and continuing financial aid and scholarship programs.
- F. Advancing priorities to achieve the undergraduate education aspects of the institutional mission ensuring alignment and close collaboration with academic leaders for strategic enrollment to meet undergraduate enrollment goals.
- G. Garnering support for the undergraduate education experience and education mission of the University from both internal and external stakeholders; partnering with the University of Minnesota Foundation to advocate and fundraise for academic scholarships for students in alignment with enrollment priorities.
- H. Collaborating with the Provost's Office, Office of the President, leaders within freshman-admitting colleges, Office of Student Affairs, Office of Equity and Diversity, University Relations, Budget and Finance, and system campus leaders to advance strategic priorities that support the undergraduate student experience.
- I. Performing such other duties as related to your employment position and assigned to you by your appointing authority.

III. PERFORMANCE

In accordance with University policy, you will receive regular annual performance evaluations and, in accordance with University Policy on Reviewing the Performance of Senior Leaders, you will receive a broader systemic review of your performance no later than the end of your third year in the position.

IV. FACULTY APPOINTMENT

In addition to your appointment as Vice Provost and Dean of Undergraduate Education, you also hold an appointment as a tenured professor in the Carlson School of Management. During the time you serve as Vice Provost and Dean of Undergraduate Education, you will not receive any compensation for your faculty appointment, but salary for this appointment will be adjusted annually based on the average increase to base of your same-ranked collegiate peers. In the event you are no longer employed as Vice Provost and Dean of Undergraduate Education, and retain this faculty appointment, this will be your established faculty salary.

V. COMPENSATION

A. Subject to the terms of this Agreement for all services provided by you on behalf of the University, the University shall pay you an annual salary of \$441,000, which is equal to the same rate of pay as your 9-month Professor of Finance appointment in the Carlson School of Management, annualized on a 12-month basis.

B. All base salary shall be paid in accordance with the University's regular payroll procedures for Professional and Administrative employees and shall be subject to withholding for applicable federal and state income taxes, federal social security taxes, and other applicable taxes and deductions.

C. In accordance with University policies and procedures, you shall be eligible for salary increases on an annual basis based upon the evaluation of the appointing authority or his/her designee.

D. The base salary is subject to furloughs, pay freezes, salary reductions or other adjustments to the same extent they are required of other employees of the University.

VI. BENEFITS

The University shall provide you with a benefits program as provided generally for its Professional and Administrative employees as described in its policies and Procedures (<http://www.umn.edu/ohr/benefits/summary/>). These programs shall be subject to amendments and modifications by the University.

VII. SEPARATION

A. Your appointment as Vice Provost and Dean of Undergraduate Education is an L appointment, which means you serve at the pleasure of your appointing authority. Your appointment may be terminated without any required notice period.

B. In the event you are separated from your administrative position, you may be eligible for certain benefits provided by the University, in accordance with

University policy. Any exception from or waiver of University policy related to your separation must be approved by the Board of Regents.

C. At the end of your administrative appointment, you may return to the faculty at your established faculty salary.

VIII. UNIVERSITY POLICIES AND GENERAL CONDITIONS

A. Your appointment is subject to the University's policies and procedures that govern your position (<http://policy.umn.edu/>), which may be amended from time to time.

B. Amendment. Any amendment to this Agreement shall be in writing executed and delivered by the parties.

C. Parties In Interest/Assignment. This Agreement shall be binding upon and the benefits and obligations provided for herein shall inure to the parties hereto and their respective heirs, legal representatives, successors, assigns, transferees or donees, as the case may be. No portion of this Agreement shall be assignable without the prior written consent of the other party.

D. Effect of Prior Agreements. This Agreement is intended by the parties as the final and binding expression of their contract and agreement and as the complete and exclusive statement of the terms thereof. This Agreement supersedes and revokes all prior negotiations, representations, and agreements, whether oral or written, relating to the subject matter hereof.

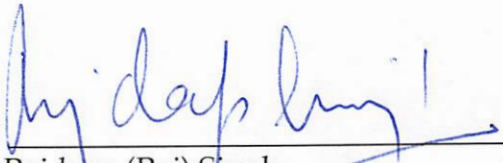
E. Enforceability. If any provision contained herein shall be deemed or declared unenforceable, invalid, or void, the same shall not impair any of the other provisions contained herein, which shall be enforced in accordance with their respective terms.

F. Construction. The headings preceding and labeling the sections of this Agreement are for the purpose of identification only and shall not in any event be employed or used for the purpose of construction or interpretation of any portion of this Agreement. No waiver by any party of any default or nonperformance hereunder shall be deemed a waiver of any subsequent default or nonperformance. As used herein and where necessary, the singular shall include the plural and vice versa, and masculine, feminine and gender neutral expressions shall be interchangeable.

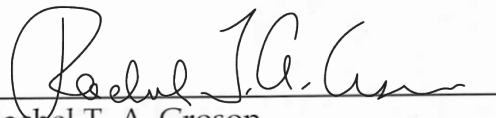
IX. BOARD OF REGENTS APPROVAL

This agreement is subject to formal approval by the Board of Regents and shall not be binding or effective until such approval is given. This agreement is also subject to the completion of a background check that is satisfactory to the University.


IN WITNESS WHEREOF, the undersigned have caused this Agreement to be executed as of the date first shown above.

By: 
Rajdeep (Raj) Singh

REGENTS OF THE UNIVERSITY OF MINNESOTA

By: 
Rachel T. A. Croson
Executive Vice President
and Provost

Approved as to Form and Execution

By: 
Douglas R. Peterson
General Counsel

**Board of Regents
Finance & Operations Committee
Long-Term Capital Financing Program
June 13, 2024**

The purpose of this item is to request the Board of Regents to undesignate five projects from the list of those previously authorized to use Long-Term Capital Financing Program (LTCFP) proceeds; and request authorization to add three capital projects to the list of projects authorized to use LTCFP proceeds.

Background

The LTCFP was created to finance University of Minnesota capital projects. The LTCFP was initially funded with the proceeds of the sale of \$500 million General Obligation Taxable Bonds, Series 2022, issued on April 19, 2022. Pursuant to Board of Regents Policy: *Debt Transactions and Long-Term Capital Financing Program*, “The Board reserves unto itself the authority to approve the use of proceeds to finance or refinance capital projects that require Board approval as defined by Board of Regents Policy: Reservation and Delegation of Authority” (Article III, Section 1, Subd. 1).

As of June 30, 2023, the Board of Regents had authorized the use of \$328,132,000 of LTCFP proceeds for the projects presented in the table below.

**Long-Term Capital Financing Program
Previously Authorized Projects and Funds**

Projects	Authorized Amount
Main Energy Plant Chilled Water	\$ 28,500,000
Masonic Institute for the Developing Brain	20,200,000
Lind Hall Renovation	27,250,000
Microbial Cell Production Facility	86,482,000
Offsite Library Collection Facility	66,700,000
Institute for Child Development	1,000,000
Mariucci/Ridder Arena Ice Refrigerant Replacement	14,000,000
Murphy Hall Media Lab	2,800,000
Chemistry Undergraduate Teaching Lab Facility	46,300,000
Shepherd Laboratories Renovation	19,400,000
Women’s Gymnastics Training Facility	15,500,000
Total as of 6/30/2023	\$ 328,132,000

Request to Undesignate LTCFP

To maintain financing flexibility considering the uncertain timing of construction costs for particular projects and the overall number of capital projects currently eligible for financing, our

outside bond counsel recommends the Board undesignate certain projects included in previous Board authorization. The following table identifies the LTCFP proceeds to be undesignated.

Projects	Previously Authorized Amounts
Fraser Hall Chemistry Undergrad Teaching	\$46,300,000
Women’s Gymnastics Facility	15,500,000
Shepherd Lab Hall Floors 3-5 Renovation	19,400,000
Offsite Library Collections Como Warehouse	63,000,000
Total to be Undesignated	\$ 144,200,000

Request for Additional Authorization

Finally, the administration is requesting Board authorization to use LTCFP proceeds to finance three additional projects. Long-term financing is appropriate for them at this time. The following table identifies the new projects to be designated:

Projects	Estimated Amount
Future of Advance Agriculture Research in MN (FAARM) – Property Purchases	\$16,600,000
Masonic Institute for the Developing Brain	7,100,000
YMCA Parking Lot - Property Purchase	2,200,000
Total	\$ 25,900,000

Summary of LTCFP Proceeds Authorized and Remaining

The following table provides an updated summary of the LTCFP proceeds previously authorized and the amount of proceeds remaining after Board approval of the recommended un-designations and additional authorization during the June 2024 Finance & Operations Committee meeting.

LTCFP proceeds authorized for use as of 6/30/2023	\$328,132,000
Less: Undesignated funds	(144,200,000)
Plus: New authorization	25,900,000
Updated LTCFP proceeds authorized for use after Board approval on 6/14/2024	\$209,832,000
LTCFP proceeds remaining to be authorized	\$287,984,428

Purchase of Goods and Services \$5,000,000 and over

To Ever-Green Energy for an estimated \$3,452,000 for the operation and maintenance services for three heating and energy-generating plants for the Department of Energy Management on the Twin Cities campus for the period of November 16, 2024 through November 15, 2029 with an optional contract extension through November 16, 2034 for an additional \$3,960,000. The total estimated contract value, if all options are exercised, would be an estimated \$7,412,000.

The operation and maintenance services contract will ensure safe, reliable, efficient, and environmentally compliant production of electricity, steam, and chilled water for the Twin Cities campus.

Increased prices from our current provider created the need for a Request for Proposal (RFP). The Department of Energy Management received three responses to the RFP. After interviewing the participants, the committee selected Ever-Green Energy as they clearly demonstrated their expertise and experience in managing heating and energy-generating plants.

The funds for this purchase are coming from the Department of Energy Management budget.

Submitted by: Bill Paulus
Associate Vice President, Facilities Management

Approval for this item requested by:

Alice Roberts-Davis
Vice President, University Services
(Signature on file in Purchasing Services)

June 13, 2024

Purchase of Goods and Services \$5,000,000 and over

To Gopher Sports Properties, LLC and Gopher Sports Network, LLC (wholly-owned entities of Learfield Communications, LLC) for an amendment to the two existing Learfield multi-media rights agreements that(i)provides an additional \$2,000,000 of revenue during the remaining years under contract for the period of July 1, 2025 through June 30, 2027, and (ii) extends the agreements for a minimum of \$119,000,000 over the ten-year extension from July 1, 2027 through June 30, 2037 for these multimedia rights of the Department of Intercollegiate Athletics (ICA) on the Twin Cities campus.

Learfield holds the multimedia rights of ICA, which include advertising, sponsorship, and promotional opportunities, including radio broadcasts, website, social media, and in-venue signage. Learfield currently has two 11-year contracts that started on July 1, 2016 and runs through the end of fiscal year 2027.

To assess the competitiveness of the proposed amendment, ICA engaged Leona Marketing Group to provide analysis, advisory, and negotiation services for the process of securing the amended terms. In addition to other favorable negotiated terms, the proposed amendment provides ICA with a minimum annual increase of \$2,377,272 over the ten-year extension compared to the terms of the existing agreements. Beginning in fiscal year 2026, all revenue earned by Learfield is subject to revenue sharing, as well as a guaranteed payment. Based on Leona Marketing Group's analysis, University leaders concluded that this amendment is in the best interest of ICA and the University. If approved, Learfield and the University propose to document it in amended and restated agreement that combines the two existing Learfield agreements and incorporates the amended terms..

Submitted by: Tim McCleary

Sr. Associate Intercollegiate Athletics Director
& Chief Financial Manager

Approval for this item requested by:

Mark Coyle
Intercollegiate Athletics Department Director
(Signature on file in Purchasing Services)

June 13, 2024

Rationale for Exception to Competitive Bidding

This purchase has not been competitively bid on because Learfield Communications currently retains the rights to all Gopher Athletics multimedia. After considering the options of extending the agreements with new terms, or going to market through a competitive bid, a decision was made to extend the agreements. This is based on market analysis and achieving a new contract structure that creates growth opportunities that will be among the highest revenue share percentages in the country. In addition, Leona Marketing Group, an independent third-party entity, was hired to assess the fairness and reasonableness of the economics for the proposed extension.

The Director of Purchasing and the University Controller concluded that the process used resulted in a fair and reasonable price for the University.

Purchase of Goods and Services \$5,000,000 and over

To Rise and Shine and Partners LLC for \$15,000,000 for a master service agreement to meet marketing goals for University Relations and the University of Minnesota system through marketing services for the period of July 15, 2024 through June 30, 2029.

In 2006, the University of Minnesota established the comprehensive institutional brand, Driven to Discover, to clearly and consistently convey how the University improves lives in the State of Minnesota and beyond. It launched that year with a public campaign that included paid media and a broad campus presence. These efforts were evaluated through public opinion research and internal audience surveys and were found to be very successful.

Since that time, the campaign has been refreshed regularly to meet defined objectives. The annual opinion research continued to show positive results in the years that the campaign was delivered.

Through a competitive process, Rise and Shine and Partners demonstrated they have the most relevant experience, strategic strength, and creative capabilities to deliver on this next phase of the Driven to Discover campaign.

The annual campaign will be funded in part through increased central reserves and O&M allocations and in part through a \$10,000,000 allocation provided by the University of Minnesota Foundation.

Submitted by: Laura Johnson
Sr. Director, Account Services
University Relations

Approval for this item requested by:

Ann Aronson
Chief Marketing Officer, University Relations
(Signature on file in Purchasing Services)

June 13, 2024

Purchase of Goods and Services \$5,000,000 and over

To RMF Engineering, Inc., PC for an estimated \$5,400,000 to develop comprehensive energy and utility plans for the Crookston, Duluth, Morris, and Twin Cities campuses for the production and distribution of campus utilities and energy that will meet the University's utility needs while providing safe, reliable, and resilient operations.

The Board of Regents approved the Systemwide Strategic Plan MPact 2025 in 2021. The plan calls for new long-term physical master plans for each campus and directs the establishment of campus-specific energy utility plans. Each campus has its own unique identity, valued by students, faculty, staff, and the surrounding community, and aligns energy and utility production and distribution capacity, demand reduction opportunities, and decarbonization goals with the campus comprehensive plan and climate action plan.

Through a competitive request for proposal (RFP) process, RMF Engineering, Inc., PC provided the best value based on a combination of fee, work plan, schedule, and experience/qualifications. The RFP selection committee consisted of individuals from Capital Project Management, Energy Management, Sustainability, and representatives from the Duluth and Morris campuses.

This purchase will be funded from the Facilities Management operating budget.

Submitted by: Bill Paulus
Associate Vice President, Facilities Management

Approval for this item requested by:

Alice Roberts-Davis
Vice President, University Services
(Signature on file in Purchasing Services)

June 13, 2024



BOARD OF REGENTS DOCKET ITEM SUMMARY

Finance & Operations

June 13, 2024

AGENDA ITEM: Information Items

Review

Review + Action

Action

Discussion

This is a report required by Board policy.

PRESENTERS: Julie Tonneson, Interim Senior Vice President and Budget Director

PURPOSE & KEY POINTS

- A. Central Reserves General Contingency Allocations
- B. Investment Advisory Committee Update
- C. Twin Cities Campus Climate Action Plan Update

Central Reserves General Contingency Allocations

Allocations from the Central Reserves General Contingency greater than \$250,000 require Board approval. There are no items requiring approval during this period. A current summary of General Contingency allocations for this fiscal year is included in the docket.

Investment Advisory Committee Update

The purpose of this item is to provide a report on the quarterly meeting of the Investment Advisory Committee held on May 29, 2024. The agenda for the meeting included:

- CEF Portfolio and Performance Overview
- Governance Update
- Manager Recommendation: RenFund I LP – Approved
- Diversifiers Portfolio Review

Twin Cities Campus Climate Action Plan Update

The purpose of this item is to provide the Twin Cities Campus Climate Resilience Plan, which is an addendum to the [Twin Cities Campus Climate Action Plan](#) presented to the Board in May 2023. Chapter 3 of the Climate Action Plan assessed the vulnerabilities and strengths to current and increasing climate hazards of various assets related to the University’s Community, Infrastructure & Energy Systems, and Environment. The Climate Resilience Plan builds upon this work by providing strategies to address the vulnerabilities and bolster the campus’s strengths found in the previous planning effort. The resilience planning was supported by research and tools from the University’s Minnesota Climate Adaptation Partnership.

Central Reserves General Contingency Allocations
Finance & Operations Committee
June 2024

Recipient	Amount	Running Balance	Purpose
1 Fiscal Year 2024 (7/1/2023-6/30/2024)			
2 Carryforward from FY23 to FY24		\$1,687,854	
3 FY24 General Contingency Allocation	\$1,000,000	\$2,687,854	
4 DPS Security Infrastructure	(\$240,291)	\$2,447,564	Pioneer Hall security project: security infrastructure improvements to Pioneer Hall/Superblock including turnstile.
5 New FY24 items this reporting period:			
6 n/a	\$0	\$2,447,564	
7 Current Balance		\$2,447,564	
8			
9 Commitments			
10 Capital Project Management	(\$100,000)	\$2,347,564	Dentistry amalgam waste project: Install onsite mercury amalgam separator in the Dental Simulation Lab.
11 Capital Project Management	(\$500,000)	\$1,847,564	Tribal Nations Plaza project: Up to \$500,000 from General Contingency funds to support refurbishment of Tribal Nations Plaza (includes replacing Skymarker bases and inground lighting). Approved by Board of Regents March 2024.
12 Projected Balance with Commitments		\$1,847,564	
13			
14 Projected Balance		\$1,847,564	

* Items \$250,000 or more subject to Board approval.



UNIVERSITY OF MINNESOTA



Twin Cities Climate Resilience Plan

Addendum to the 2023 Climate Action Plan

2024

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Presented to the Regents of the University of Minnesota

June 13, 2024



Land Acknowledgement

The University of Minnesota campuses were built on the traditional homelands of the Dakota and the Ojibwe, and scores of other Indigenous peoples who have walked on these lands from time immemorial.

It is important to acknowledge the peoples on whose land we live, learn, and work as we seek to improve and strengthen our relations with our tribal nations. We also acknowledge that words are not enough.

We must ensure that our institution provides support, resources, and programs that increase access to all aspects of higher education for our American Indian students, staff, faculty, and community members.

Mission Statement

The University of Minnesota, founded in the belief that all people are enriched by understanding, is dedicated to the advancement of learning and the search for truth; to the sharing of this knowledge through education for a diverse community; and to the application of this knowledge to benefit the people of the state, the nation and the world. The University's threefold mission of research and discovery, teaching and learning, and outreach and public service is carried out on multiple campuses and throughout the state.



Introduction 1

Climate change is here.

Reducing carbon emissions will reduce the severity of climate change. However, the University of Minnesota Twin Cities must also plan for changes in climate that have already happened and will worsen over time. The campus community, infrastructure and energy systems, and environmental assets are and will be affected by climate change. Creating proactive strategies to adapt and build resilience in all these areas is vital. **The Climate Resilience Plan presented here is part two of the University of Minnesota Twin Cities Climate Action Plan.**

Climate Change

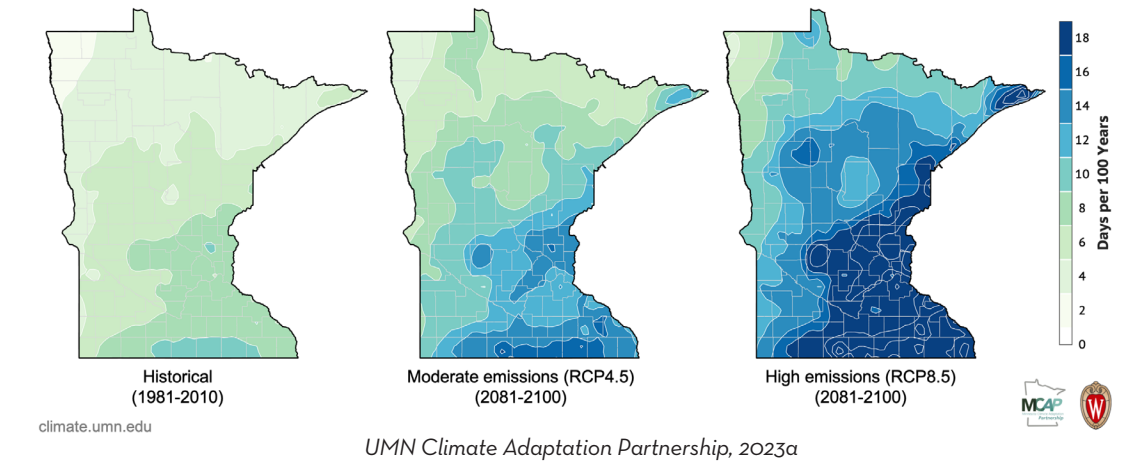
Greenhouse gas concentrations continue to rise and are now at their highest levels in 2 million years. As a result, the Earth is now about 2°F (1.1°C) warmer than it was in the 19th century (NASA, n.d.), nearing the 2.7°F (1.5°C) threshold beyond which notable temperature and precipitation extremes are more likely*. The last decade (2011-2020) was the warmest on record.

While a 2°F increase in global temperature may not seem like a lot, the Earth is a complex system and small shifts in the climate can have tremendous impacts. As a result of climate change, the world is already experiencing more intense droughts, water scarcity, severe fires, rising sea levels, flooding, melting polar ice, catastrophic storms, and declining biodiversity (Intergovernmental Panel on Climate Change, 2022). Even just a small half degree of warming can have astronomical effects, not only on humans, but on agriculture, wildlife, water supply and the economy.

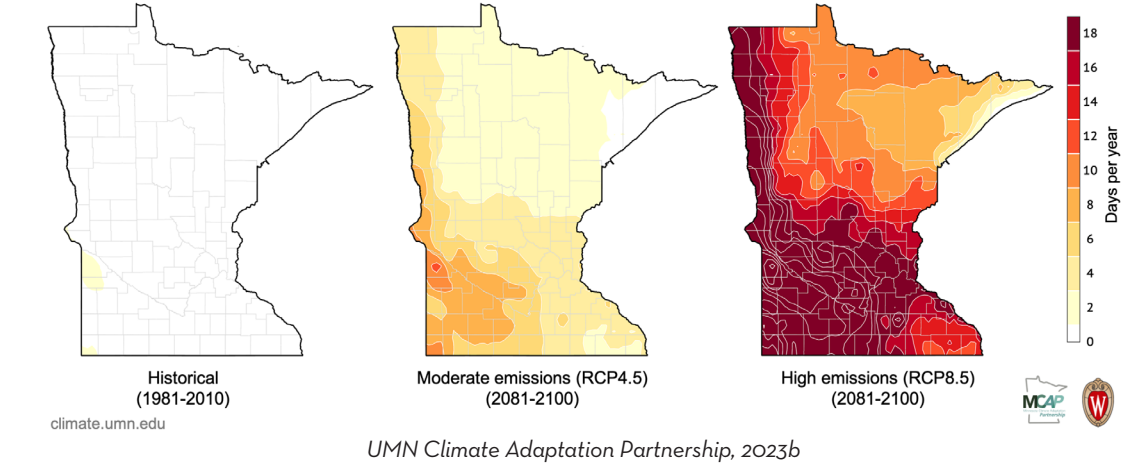
Climate change is already experienced throughout Minnesota. The 10 warmest and wettest years in Minnesota have occurred since 1998 (Minnesota Department of Natural Resources [DNR], 2021). Shifts from the historic Minnesota climate will continue along similar trends. Extreme events, like flooding, drought, and heatwaves, will likely become more frequent and more intense with climate change.

* Source: IPCC

Average Number of Days per 100 Years When Daily Rainfall Exceeds 4 Inches



Average Number of Days Per Year When the Daily High Exceeds 100°F



Campus Community Assets
All students, faculty, and staff of the Twin Cities campus

Infrastructure and Energy System Assets
All campus buildings, hardscape (streets, sidewalks, etc.), specialized spaces, stormwater grey infrastructure, and energy system physical components

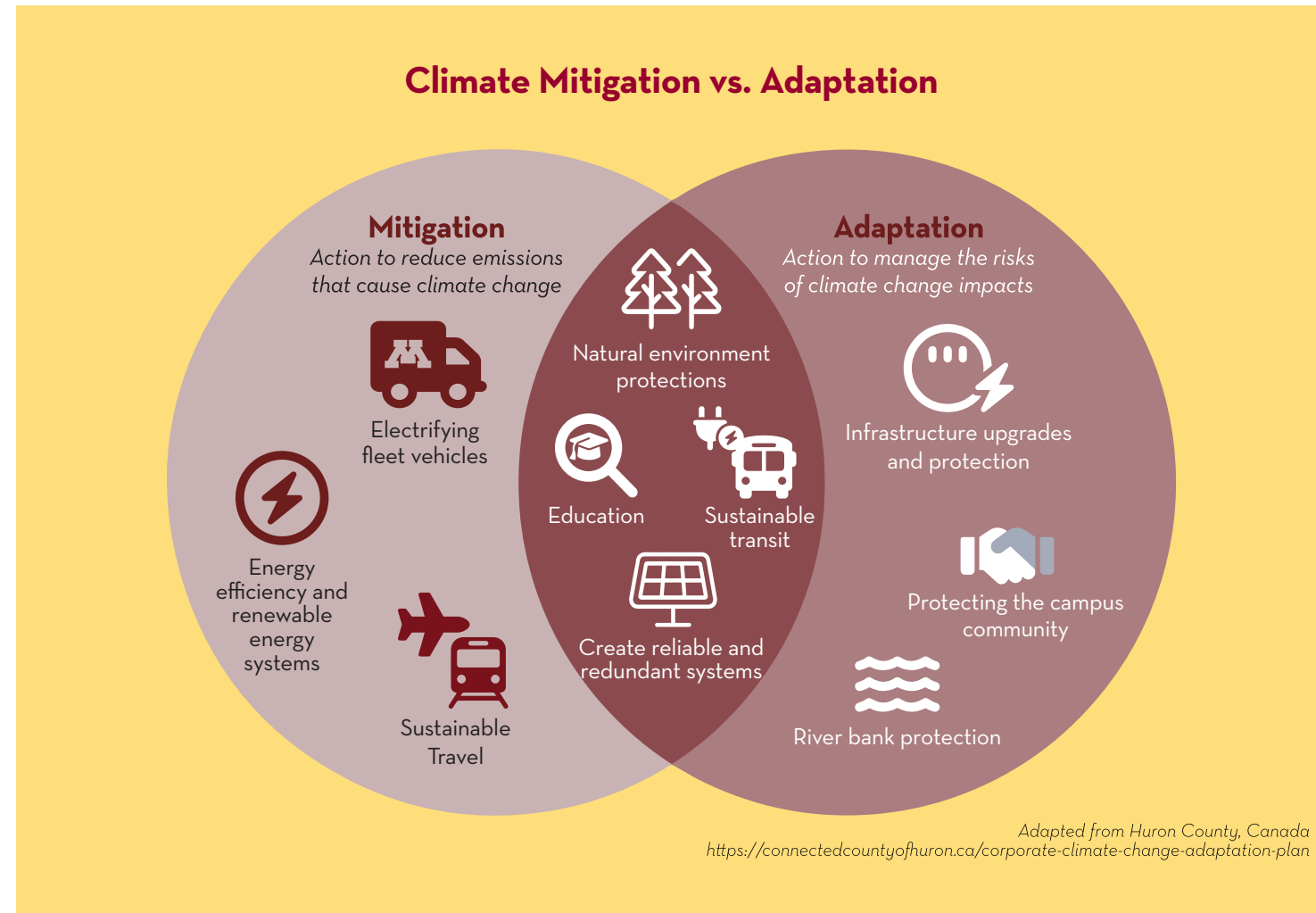
Environmental Assets
All natural and manicured plantings, soil and water resources within the campus outdoor spaces

The University will uphold its mission and thrive in the face of such **threats**. Climate **adaptation** and **resilience** planning prepares for not only the shocks (flash floods, etc.) of climate change, but also for the stressors it puts on every life, infrastructure, and organism. Planning for current and future risks of climate change aims to safeguard human life, manage stressors on the campus community and the natural and built environments, and proactively introduce new designs and systems to adapt.

Threat
Existing conditions that impact assets regardless of climate change (weathered buildings, budget cuts, etc.)

Adaptation
Action taken to adjust to a hazard

Resilience
An asset's ability to recover from impact while retaining its intended structure and/or purpose



Process

A Climate Resilience Working Group, made up of twenty diverse students, faculty, and staff led the planning effort with the Office of Sustainability. The Working Group expanded and contracted throughout the process to incorporate subject matter expertise and increase collective understanding of the interconnectedness among the assets. Twelve focus groups, with over one hundred participants, provided input on the outcomes of the Working Group. The entire campus was invited to an open house to gather final input.

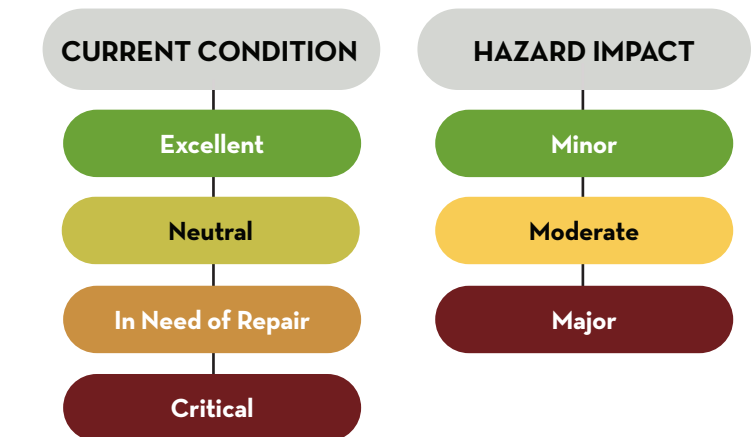
Steps of the Vulnerability Assessment

Define

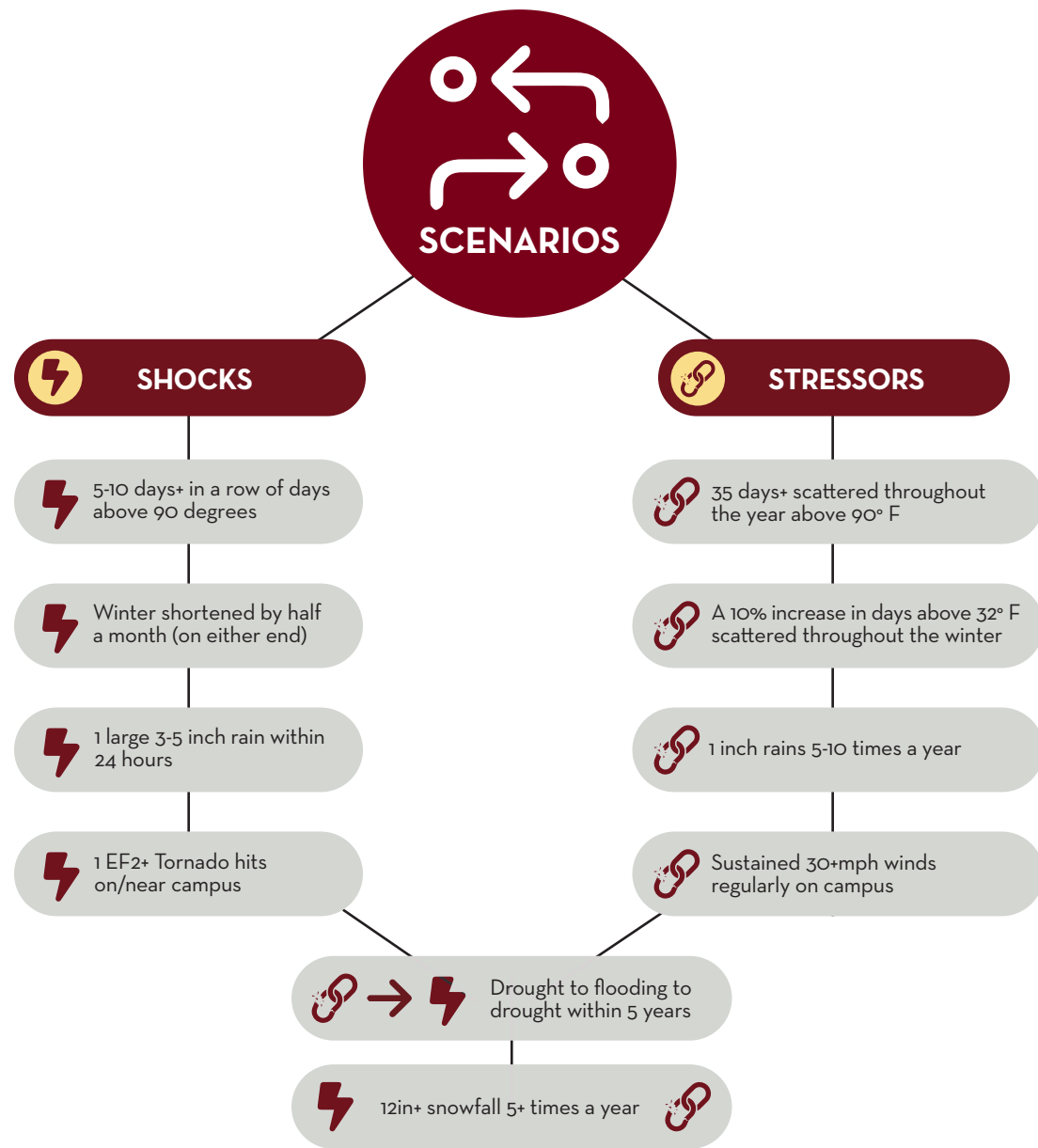
- ASSETS**
- > Campus Community
 - > Infrastructure/ Energy Systems
 - > Environment

- CLIMATE HAZARDS**
- > Precipitation
 - > Temperature
 - > Storms

Score



The initial vulnerability assessment of the Twin Cities campus was delivered in part one of the Climate Action Plan, which can be found at z.umn.edu/UMNTC_CAP. Assets for the Climate Resilience Plan were selected based on a combined concern of their current condition and the potential impact that minor, moderate, or major local climate hazards would have on them. Data and institutional knowledge fed into this process. Scenarios, as drawn up here, further defined which areas to focus on.



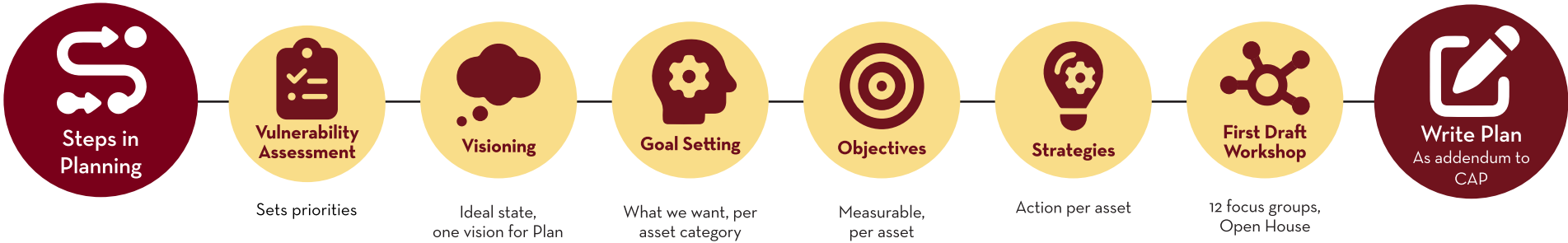
Shock
A time-bound event with high, immediate impact

Stressor
A long-term, continuous low-grade impact that accumulates over time



Steps in Climate Resiliency Planning

The graphic below illustrates the step-by-step process from envisioning and goal setting to creating the completed Climate Resilience Plan. These steps in planning served as a roadmap for our strategic approach toward building a fully sustainable future.





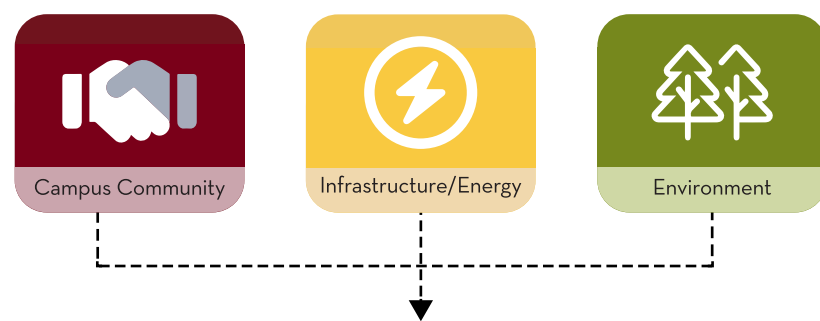
Strategic Framework

2

Vision

A University community thriving in the face of climate change

The Plan lays out a **vision** for the Twin Cities campus to be resilient in the face of climate change. Goals relate to each “asset” category: the Campus Community, Infrastructure and Energy Systems, and the Environment. Objectives and strategies relate to each asset that is prioritized through the vulnerability assessment. Over the course of eight months, the Climate Resilience Work Group assembled this plan, reviewed it with a wider campus community, and now put it forward for full implementation.



1. VISION
Sets the Course for the Next 10 Years

2. GOALS
Identify Programmatic Areas of Work

3. OBJECTIVES
Define Measurable Target

4. STRATEGIES
What UMN Will Do to Get There

Goal Summary

Campus Community

Goal: Co-create a healthy, safe, equitably resourced future for all in the face of disproportionate hazards of climate change

Focus Areas:

- > Essential Employees
- > Public Health with Vulnerable Populations

Infrastructure/Energy

Goal: Evolve infrastructure and energy systems to ensure equitable and reliable operations under climate change

Focus Areas:

- > Building Envelope
- > Emergency Power Supply
- > Steam/Electricity Generation
- > Research Space
- > Communications/IT
- > Grey Infrastructure

Environment

Goal: Steward the University’s natural environment, in balance with the built environment, to enhance climate adaptation and safeguard human health

Focus Areas:

- > Tree Canopy
- > Green Space
- > River Bank



March 2023 Climate Action Planning Open House

Campus Community

Protecting our campus community from the on-going stress and high impact events of climate change is a top priority. Some of our campus community are more exposed than others to climate change. Essential and outdoor employees must regularly commute and work on-site under most conditions. Some are more vulnerable due to a history of systemic marginalization. Others lack a social net (first generation and international students), the financial resources to adapt, or have a disability or health condition, making the impacts of climate change a great exacerbation of already existing challenges. This Climate Resilience Plan calls out these unique circumstances and looks to address them, informed by the communities most affected.

Goal

Co-create a healthy, safe, and equitably-resourced future for all in the face of disproportionate hazards of climate change

Mitigation & Adaptation

Working With or Against Each other?

Climate hazards, poor air quality, and extreme temperatures impact time outside. Actions taken to reduce emissions from transportation, like walking, biking, and taking transit, are more difficult under these conditions. Those who commute every day and those who choose alternative transportation for financial reasons will be affected most and personal adaptation will be necessary. On the other hand, climate change may expand the shoulder seasons of the warmer months and increase the opportunities to walk and bike more.

Focus Areas

- > Essential Employees
- > Public Health with Vulnerable Populations

Hazard

Specific weather conditions enhanced by climate change (heavy rain, high heat, changes in humidity, etc.)

Essential Employees

An employee who has been designated as vital to the operations of the University, whose presence is required regardless of the existence of an emergency condition, or whose absence from duty could endanger the safety and well-being of the campus population and/or physical plant.

Vulnerable Populations

Members of the campus community are likely to be impacted by climate change differently depending upon many factors, which are sometimes compounded by one another. The following characteristics may increase one's risk to climate change: member of a systemically marginalized community through race; mobility constraints; financial vulnerabilities; health vulnerabilities; and other access constraints (first-generation students, international students, newcomers, autonomy of age)

Essential Employees

Objective

Ensure 100% of essential workers whose commute and work is impacted by weather, heat and air quality, and their managers, are aware of the physical and mental health impacts of climate change and empowered to respond and protect themselves as needed.

STRATEGY

- 1.1 Create the policies and systems so that the employees most affected manage the shocks and stressors of climate change
- 1.2 Empower employees through awareness campaigns about local climate hazards



Public Health with Vulnerable Populations

Objective

Increase awareness of physical and mental health impacts of climate change and provide systemic support to campus communities most vulnerable to climate impacts.

STRATEGY

- 2.1 Create and implement a Climate Resilience Task Force with representation from all vulnerable communities
- 2.2 Build and maintain bidirectional communications with vulnerable communities
- 2.3 Create support and climate hazard education for staff who inform/influence impacted communities in relation to their work
- 2.4 Ensure campus resources support basic needs when under duress of climate hazards (housing, transportation, food, etc.)
- 2.5 Enhance and expand access to external resources
- 2.6 Reflect on recent events for lessons learned and act on insights in order to come back stronger

Infrastructure and Energy Systems

Infrastructure is expansive on the Twin Cities campus. The buildings and energy systems support the campus mission. This not only entails classrooms and laboratories, it also includes underground grey infrastructure, the electric grid, the campus IT, hardscape to walk and drive on, and multiple utility plants generating energy to power campus. Heavy rain events, strong storms, a high demand for cooling, and an increase in freeze/thaw events strain and even damage our infrastructure and energy systems. The plan focuses on what high standards we need to maintain, how we'll ensure (fossil fuel-free) power, and inform our next decisions with climate change modeling.

Goal
 Evolve infrastructure and energy systems to ensure equitable and reliable operations under climate change

Mitigation & Adaptation

Working With or Against Each other?

Extreme temperatures and heavy rain events threaten the built environment. The building sealants and insulation needed to protect against these events will also aid energy conservation. Yet other areas will require more power under climate risk. Ensuring stable IT communications will require more power. Emergency power will continue to depend on fossil fuels until necessary technology becomes available at a reasonable cost for the campus. An increased demand for cooling load from higher, sustained temperatures and changing shoulder seasons will also pressure energy needs.

Focus Areas

- > Building Envelope
- > Emergency Power Supply
- > Steam/Electricity Generation
- > Research Space
- > Communications/IT
- > Grey Infrastructure



Building Envelope

The exterior or facade of a building, which includes walls, windows, roof, and foundation.

Grey Infrastructure

A network of drains and pipes, primarily underground, to convey stormwater

Building Envelope

Objective
 Maximize climate readiness of the building envelope of new and existing buildings.

STRATEGY

- 3.1 Define climate readiness to ensure performance that addresses air quality, temperature regulation, and precipitation impacts from climate change hazards, that also enhances energy efficiency
- 3.2 Examine new building (B3+) standard's climate rigor and ensure future climate modeling for all capital investment
- 3.3 Prioritize and renovate existing, investment worthy* building roofs, windows, and facades that present vulnerabilities to climate hazards (life span/age/condition)



Research Space

Objective
 Ensure that 100% of all outdoor and indoor research space is strategically managed for climate hazards.

STRATEGY

- 4.1 Create criteria to identify research spaces that are "sensitive" to the impacts of climate change
- 4.2 Relocate sensitive research or adapt research spaces to climate hazards
- 4.3 Ensure all critical research spaces have reliable utilities



* According to the Facility Conditions Assessment

Information Technology & Communications

Objective
Establish and adopt 99.999% uptime for critical IT systems to support life, health and safety..

STRATEGY	
5.1	Revise Building IT Standards for current and future climate hazards for life, health and safety
5.2	Further enhance IT applications for disaster recovery and continuity planning
5.3	Partner with Energy Management to map critical IT to emergency power generation and address all vulnerabilities
5.4	Ensure emergency communications are uninterrupted by meeting network needs

Grey Infrastructure

Objective
Adapt grey infrastructure to meet 100% of precipitation capacity modeled to intermittent/high emissions projections for year 2100.

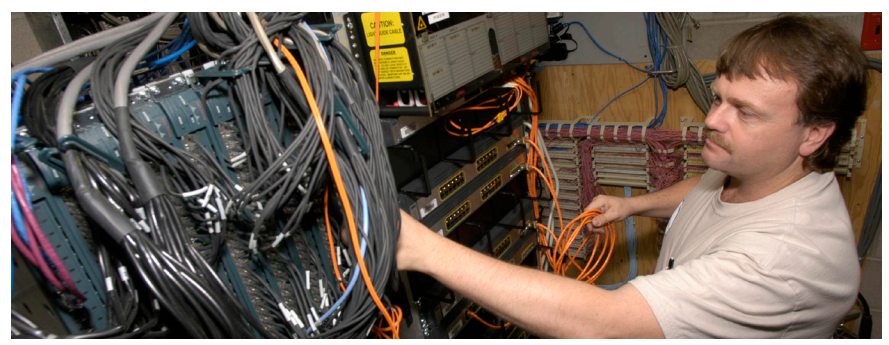
STRATEGY	
6.1	Update grey infrastructure design standards to align with year 2100 climate hazards precipitation models
6.2	Build new, and renovate existing, grey infrastructure to meet year 2100 climate hazards precipitation models

Emergency Power Supply

Objective
Optimize to a 99.5% generator readiness and reliability to protect property, personnel safety, and integrity of systems.

STRATEGY	
7.1	Develop and maintain black start plan(s) and test
7.2	Maintain onsite fuel tank capacity sufficient to allow time to implement emergency action plans, demand-response strategies and black start (4-8 hours depending on specific generators)
7.3	Develop/formalize emergency fuel inventory guidance to include determining necessary volumes, investigating fuel treatments to prevent spoilage (quality preservation), balancing volume vs quality, and investigating offsite supply partners with transportation capability (emergency contracts)
7.4	Replace, where possible and beneficial, emergency generators with existing battery backup and new battery technology (off peak or photovoltaic charge)

Black Start
This is the ability of energy generation to restart parts of the power system to recover from a blackout

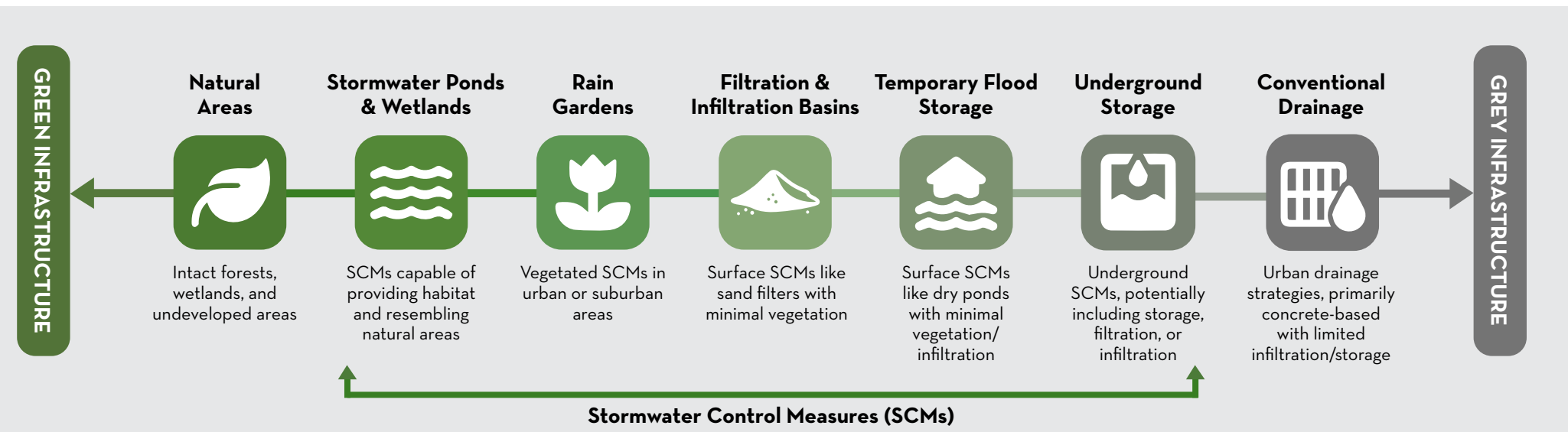


Steam/Electricity Generation

Objective
Maintain sufficient availability, reliability, and redundancy of heating and cooling to satisfy demand on all campuses/districts as well as electric generator availability at 99%.

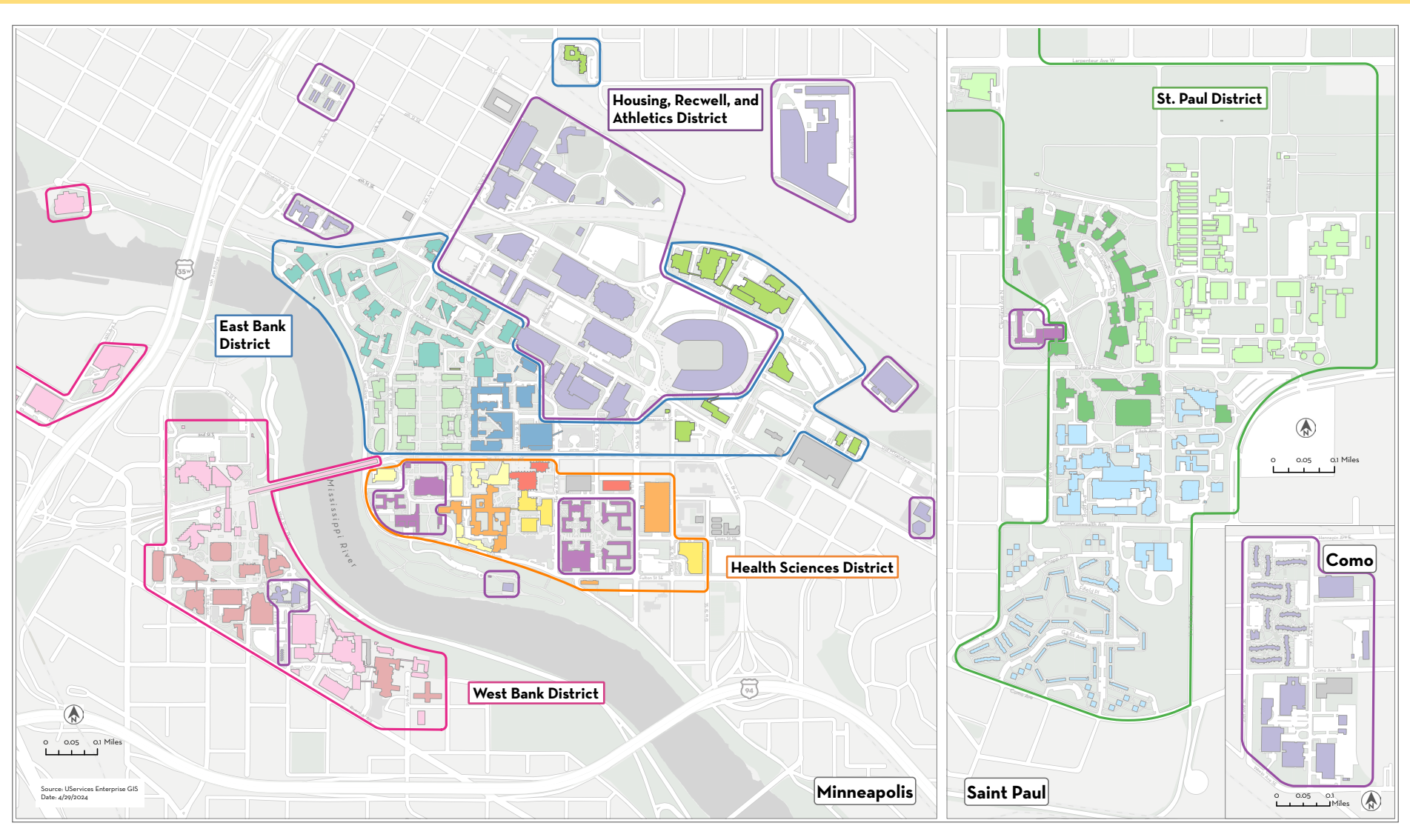
STRATEGY	
8.1	Maintain sufficient volumes and quality of fuel oil or coal at the generating plants to maintain 5 days of operation and evolve generating assets to satisfy CAP requirements while maintaining resiliency
8.2	Ensure black start capability by plan and test (connect planning with emergency generators)
8.3	Protect plants from flood stage waters
8.4	Partner with campus facility districts to understand changes in energy demand that stem from improvements, new buildings, demos
8.5	Partner with districts to optimize demand response plans
8.6	Plan for long-term evolution away from fossil fuels
8.7	Continue regular dialogue and mutual project planning with districts, Facilities Management, and utility operations

University of Minnesota Twin Cities Districts
The Twin Cities campus is organized under five districts



Adapted from <https://doi.org/10.3390/w12020522>

Facilities Management District Map



Environment

The Twin Cities' campus has a landscape of managed and natural environments. All organisms, water systems, and soils will be impacted by climate change. The ebb and flow of drastic precipitation and drought increases the threats of disease, erosion, and damage to the campus environment. These environmental assets are also a strength in the fight against climate change. Trees and green space cool the surroundings on a hot day. They naturally filter and absorb water from heavy rain events. The natural environment absorbs carbon while sustaining the campus community with cleaner air to breathe. This plan puts a focus on understanding the role our environment plays in climate change and leverages the natural environment as an asset.

Goal
Steward the University's natural environment, in balance with the built environment, to enhance climate adaptation and safeguard human health.

Mitigation & Adaptation

Working With or Against Each other?

Our environmental assets are quite vulnerable to climate hazards. They are also critical in adapting to the impacts of climate change. However, they can pose challenges as well. Trees cast shade, sequester carbon, passively cooling both buildings and humans alike on a hot day. However, some also produce pollen, which collects in building filtration equipment. A tree's root system is critical for absorbing rainwater on-site, but its roots can also disrupt building foundations. Where and what to plant is critically important to addressing these issues.

Focus Areas

- > Tree Canopy
- > Green Space
- > River Bank



Tree Canopy

Objective

Enhance campus-wide tree canopy for cooling & stormwater benefits, by the amount identified through further research on optimal tree cover, with climate resilient, diverse species for ecological and human health.

STRATEGY	
9.1	Research optimal tree cover for maximum ecosystem services in the face of climate change for minimal hazard to the built environment
9.2	Increase species diversity and age of tree canopy with placement consideration, in order to enhance ecological and human health outcomes
9.3	Reduce loss of existing, high value trees as determined by campus standards and the Landcare Tree Plan



Green Space

Objective

Maximize low-input, community-conscious green space, complimentary to grey infrastructure, by the amount identified through further research, to maximize ecosystem services and climate adaptation.

STRATEGY	
10.1	Research and define a campus-wide strategy to optimize climate resilient green space
10.2	Implement balanced, multifunction, low-input green spaces
10.3	Partner with neighboring communities to extend the climate resilience of the surrounding watershed

 **River Bank**

Objective

Design the University of Minnesota's future built environment to eliminate the campus's contribution to Mississippi River bank erosion and manage 100% of the slope that the University has oversight of.

STRATEGY

- 11.1 Identify and manage risks to University owned river banks
- 11.2 Work with partners to proactively manage the river bank, slope, and bluff
- 11.3 Ensure University of Minnesota design standards and capital investment create no further erosion of the Mississippi river bank





Implementation Support

3

Implementation Support

Cross-Cutting Initiatives

The Climate Action Plan called out common themes and strategies with broader impacts and considerations that are also important to the Climate Resilience Plan. The cross-cutting initiatives below are critical to advancing the adaptation and resiliency goals and strategies. These will require their own planning specific to the Climate Resilience Plan:

- Build Campus Sustainability Culture and Communications
- Enhance Climate Action in Curriculum and Research
- Develop Funding & Finance Approach to Advance Goals



Plan Implementation

The Climate Resilience Work Group identifies champions for each strategy. Champions are the lead stakeholder, not necessarily doing all the work, but yet ensuring the work is completed. Champions will develop implementation Blueprints in support of the identified strategies. The Blueprints will identify detailed pathways to completion including implementation steps, partners, a timeline for completing each step, and other pertinent information specific to the strategy.



Acknowledgements

The Climate Resilience and Adaptation Plan was made possible by the contributions and commitment of dozens of people across the institution. We are grateful for their generosity of time and skill, and the sincerity they brought to the work.

Cathy Abene - Principal Civil Engineer, Facilities Management

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Maram Falk - Assistant Director, Energy Management

Amanda Farris - Senior Program Manager, Minnesota Climate Adaptation Partnership

Tobias Fimpel - GIS Developer, University Services

Madisen Gittlin - PhD Candidate, College of Food, Agriculture, and Natural Sciences / College of Science and Engineering

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Joe Krekeler - Principal ME Supervisor, Energy Management

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Hannah Lauber - Sustainability Communications Associate

Kate Nelson - Director of Campus Sustainability

Carley Rice - Sustainability Coordinator

A special thanks to all who participated in the open house, focus groups, or shared your voice in other ways. Your advocacy and input have been invaluable.





Appendix A

Citations

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