

UMass **Amherst** OUTREACH



STRATEGIC BUSINESS PLAN

FY 2006-2008

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Section 1 Introduction

Section 1-1: EXECUTIVE NOTE

This Strategic Business Plan has been developed with the full participation and contributions of the directors of the five UMass Amherst Outreach units and other key staff members. While the responsibility for the implementation of this plan rests with the vice provost, broad participation in the development of Outreach goals and objectives is essential to our success. Outreach faculty and staff must understand, internalize, and coordinate the implementation of the strategies and tactics outlined here. It is essential that every member of the Outreach team assist the organization to reach its goals and to continually improve itself by recommending and implementing approved modifications to business procedures and practices.

As we initiate structural changes within the Division of Outreach, we must formalize our vision, goals, and tactics. This document serves as a framework for that purpose. We serve many different constituencies and we must consider their distinct needs and how to best address them. Our priorities this year will be focused on building the best structure from which Outreach can provide the finest service to our internal and external client base.

Section 1-2: OUTREACH MISSION STATEMENT

UMass Amherst Outreach engages the university with the community in economic, social, cultural, environmental, and educational issues. Outreach applies the teaching, research, and knowledge resources of the university with benefit to the public throughout the Commonwealth, nation, and world.

Section 1-3: OUTREACH VISION & KEY DIRECTIONS

In order to serve new constituencies and to compete in an increasingly complex marketplace, the engaged university must redesign and transform its outreach units by improving the quality of academic programming, by creating improved experiences for students and other learners, and by quickly responding to external constituency needs. While outreach was once limited to providing isolated support for external groups, universities now must provide educational opportunities in credit, non-credit, on-line, accelerated, and weekend formats, as well as assume leadership in community, economic and workforce development; grant procurement; and donor and alumni relations. This requires a commitment to developing interactive and dynamic collaborations with external partners in education, business, industry, government and communities.

In responding to the challenges of this new environment, UMass Amherst has an opportunity to renew its commitment to engagement as a flagship land-grant institution in ways that promise to strengthen the university and the Commonwealth. Cultivating new audiences, pioneering new approaches, and integrating programs will amplify

community impact and chart a new direction. This plan requires a new strategy to unite outreach programs in a common effort to:

- Work collaboratively with each academic school or college to develop programs that expand access to the university and link faculty expertise in teaching, research, and service to the critical needs of the Commonwealth and beyond.
- Serve as a catalyst by reaching out to diverse local, state, national and international constituencies, by identifying educational needs, and by engaging the intellectual resources of the university in response to those needs through the delivery of effective educational programs using multiple modalities and technology-based delivery systems.
- Provide leadership that expands the core capabilities of academic units. Potential areas of expansion include: assessing market and client needs; developing, marketing, delivering and managing outreach programs and services; managing client relationships; providing program innovation funding; expanding grant development; expanding community, economic and workforce development; and disseminating faculty research.
- Facilitate an environment of outreach and engagement within the university. As national organizations seek to define and implement guidelines for these activities, it is important that the Division of Outreach monitor and adopt successful strategies and monitor relevant trends.

Individual units must develop new identities as important parts of the larger Division of Outreach and of the University of Massachusetts Amherst. While the units do have their own specific identities and sense of mission, they must identify with a common UMass Amherst Outreach mission.

Section 1-4: OUTREACH GOALS & PRIORITIES
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There are many areas within UMass Amherst's Division of Outreach that need attention for its programs to more effectively meet the needs of the public. The five Outreach units provide education and information to a variety of customers. These include full and part-time students, agriculture and food businesses, youth organizations, public officials, teachers, and public radio listeners. It is important that Outreach build a flexible and responsive organization that meets current needs and is capable of anticipating future needs. Sources such as Carol B. Aslanian's *Adult Students Today* indicate that higher education will continue to attract adult learners over age twenty five that are mainly women and that higher education growth rates for this population are exceeding those of traditional students. Additionally, the higher education market is being driven by demand in business, education, health, engineering, and technology fields.

Several near-term steps will be taken to encourage new program development. A program innovation fund will be designed and implemented, Continuing Education revenue-sharing practices will be standardized, summer programming must be broadened, and a workforce development structure built. In addition, there are basic

capacities -- such as marketing research and financial analysis – that are already under development.

In any strategic plan, the development of measurable goals is instrumental to the successful implementation of the plan. The following goals are introduced here; the next section outlines the strategies that accompany these goals.

Goal Area 1 – Program Development: Expand offerings to include new credit and non-credit certificates, programs, courses, and institutes targeted to specific career sectors, as well as a full complement of general education courses to support degree programs in online and face-to-face delivery. Program development goal setting will include implementation of market research strategies and identifying new program formats. These could include accelerated, block, half-semester, and weekend college concepts.

Goal Area 2 – Customer Service: Improve service to our customers by exceeding expectations in advising, broadcasting, feedback, information, instruction, and programming options. Every client must receive the best possible service when engaging the university for the wide spectrum of Outreach offerings. It is imperative that we approach every contact as a potential repeat customer.

Goal Area 3 - Process Review and Change Management: Conduct process mapping and align systems with those used by central offices within the university. Define and set income generation goals for each unit. Adapt the organization to best serve the needs of internal and external constituencies. Outreach must be responsive to the needs of its customers and flexible in program offerings. This takes informed and innovative thinking and a structured organization committed to continual improvement and refinement of processes.

Goal Area 4 – Professional Development: Conduct division-wide professional development sessions each semester and encourage staff attendance at national conferences to facilitate national market awareness and skills to shape and improve Outreach's ability to meet institutional priorities.

It is imperative that each member of the Division of Outreach understand the goals for the ensuing three fiscal years. Although each of the four goals may not apply in every functional area, all Outreach staff must gain a broad perspective of the goals and capabilities of the entire Division.

Section 2 Strategic Goals & Tactics

Section 2-1: GOAL AREA 1 – PROGRAM DEVELOPMENT

Strategy: **Conduct Market Research**

- Use Eduventures membership, the Donahue Institute, and other sources to leverage market trends and demands. Use this data to develop financially viable program offerings. *Ownership: Outreach Marketing & Communications*

Strategy: **Develop Closer Relationships with Internal University Partners**

- Establish a recurring meeting schedule with your internal university partners. When appropriate, meet at their location to demonstrate commitment to their needs. *Ownership: Vice Provost, Unit Directors*
- Publish a list of annual recurring activities and requirements for partner input. This will help unit staff and partners to anticipate events and deadlines. *Ownership: Unit Directors*

Strategy: **Develop a Program Innovation Fund**

- Develop a concept and procedural guide. This guide will define the process that faculty and others will use to request seed funding for new program development as well as other initiatives. *Ownership: Vice Provost*

Strategy: **Evaluate and Enhance Summer Session Programming**

- Review August 2005 summer session consultants' report. Convene appropriate planning committees to implement feasible short and long term improvements to summer session programming. *Ownership: Vice Provost*

Strategy: **Establish Workforce Development Plans**

- Review March 2005 workforce development consultant report. Implement appropriate recommendations to facilitate entry into this important regional and Commonwealth-wide market. *Ownership: Vice Provost*
- Build the requisite infrastructure to address workforce development. Organize existing campus entities to address business and industry educational needs. *Ownership: Vice Provost*

Section 2-2: GOAL AREA 2 – CUSTOMER SERVICE
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Strategy: Improve Customer Relationships

- Establish a recurring contact schedule with business partners and clients. When appropriate, meet at their location to demonstrate commitment to their needs. *Ownership: Vice Provost, Unit Directors*

Strategy: Revise Customer Information

- Conduct publication audit. Review all brochures, catalogs, and web information for consistency and professional message and university branding. Simplify links and navigation through all Outreach web pages. *Ownership: Outreach Marketing & Communications*

Strategy: Train All Outreach Staff on Customer Service

- Research and provide best practice information to all units on the highest level of customer service. Coordinate for a Division-wide professional development session on customer service. Investigate implementation of a formal Customer Relationship Management (CRM) system. *Ownership: Vice Provost*
- Conduct annual and new staff training on proper customer service techniques with customers. Address proper methods to address in person, phone, and email inquiries. *Ownership: Unit Directors*

Section 2-3: GOAL AREA 3 – PROCESS REVIEW & CHANGE MANAGEMENT

Strategy: **Benchmark Other University Outreach Organizations**

- Conduct a web-based benchmarking initiative that compares the mission, structure, programs, etc. of other major university competitors. *Ownership: Outreach Benchmarking Initiatives Subcommittee*
- Use benchmarking information to identify changes to unit organizational structure. *Ownership: Unit Directors*

Strategy: **Implement Financial Control Measures**

- Request appointment of a committee to review how Continuing Education tuition fees are established and revenue sharing is conducted. Develop consistent fee structures for implementation in FY 2007. *Ownership: Vice Provost*
- Develop an annual line-item budget and income projections for each unit. *Ownership: Outreach Finance and Budget*
- Develop metrics and format for a quarterly scorecard review. *Ownership: Outreach Finance and Budget*

Strategy: **Enhance Internal Division Communications**

- Schedule monthly Outreach Administrative Council Meetings to review and update the council of all ongoing initiatives. *Ownership: Vice Provost*
- Publish a staff roster to facilitate communications across the Division. *Ownership: Outreach Marketing and Communications*
- Publish a quarterly outreach update to all staff. *Ownership: Outreach Marketing and Communications*
- Formalize the strategic planning process by publishing annual milestones to collaborate on the development of the strategic business plan. *Ownership: Vice Provost*

Strategy: **Assess, Identify, and Implement Process Changes**

- Assess marketing and communications needs and strategies. *Ownership: Outreach Marketing and Communications*
- Identify current information technology needs and develop implementation strategies using August 2005 IT assessment report. *Ownership: Vice Provost*
- Align Continuing Education business processes such as registration and bursar functions with those of central university offices. *Ownership: Vice Provost*

Section 2-4: GOAL AREA 4 – PROFESSIONAL DEVELOPMENT

Strategy: Enhance Capability of Outreach Staff through Professional Development Opportunities

- Conduct formal and timely counseling and evaluation for all staff. Establish measurable and achievable individual performance objectives that align with unit and division goals. Supervisors should ensure that these goals are discussed, fostered, counseled, and evaluated through the Performance Management Program and Annual Performance Evaluations. *Ownership: All Supervisors*
- Develop appropriate measures to award merit pay adjustments. *Ownership: Vice Provost, Unit Directors*
- Conduct professional development sessions each semester with unit directors or an expanded audience to facilitate attainment of Outreach goals. *Ownership: Vice Provost*
- Enhance Division professional development with tailored unit level sessions with respective staff to further achievement of division and unit goals. *Ownership: Unit Directors*
- Fund and facilitate attendance at nationwide conferences and other professional development opportunities for appropriate staff. *Ownership: Vice Provost, Unit Directors*

Section 3 Division Overview

Section 3-1: ORGANIZATION HISTORY

Since its establishment in 1997, the Division of University Outreach at the University of Massachusetts Amherst has been managed by a succession of interim leaders at several organizational levels within the university administration. The position of Vice Chancellor for Outreach was changed to Vice Provost for Outreach in 2003, and now reports directly to the Provost. The Division includes Continuing Education, Extension, STEM (Science, Technology, Engineering, and Mathematics) Education Institute, University Without Walls, and WFCR 88.5 FM Public Radio.

Interim leadership, budget constraints, and the interim leadership of individual Outreach units have limited program expansion within the Division and its ability to fully develop and work effectively on behalf of the University of Massachusetts Amherst. Unlike other universities, where such conversations began on an organizational scale more than a decade ago, the UMass Amherst community is only now beginning to consider the meaning of engagement and the nature of outreach scholarship in a broad and powerful way.

Section 3-2: ORGANIZATIONAL CHART

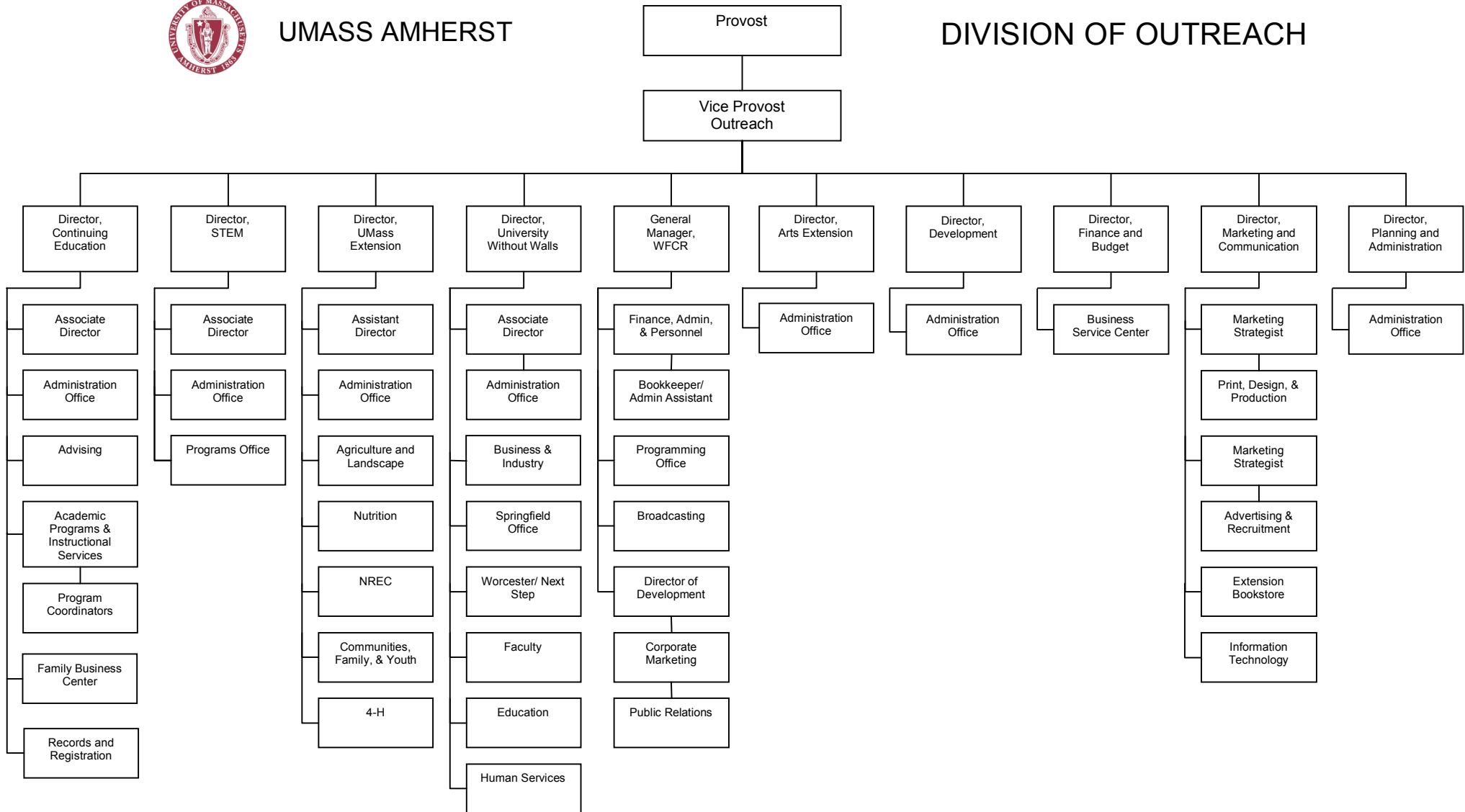
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UMASS AMHERST OUTREACH STRATEGIC BUSINESS PLAN



UMASS AMHERST

DIVISION OF OUTREACH



Section 3-3: PLANNING PROCESS

It is important to make the planning process an inclusive one in order to facilitate improvements in all of the five Outreach units. Key staff members from all of the units participated in several organizational development sessions during which they addressed the following objectives:

- Discuss and define what Outreach and engagement means nationally; how should that national definition shape UMass Amherst Outreach?
- Define UMass Amherst Outreach – what is our mission?
- Discuss UMass Amherst Outreach’s responsibility as a self-supporting division that also has revenue-generating responsibilities for the University.
- What should be the initial overarching goals and objectives that will influence individual unit strategic business plan development?
- What are the Division’s values? These should shape guiding principles.

The group conducted a SWOT (strengths, weaknesses, opportunities, and threats) analysis and formed discussion groups to develop a mission statement, focus areas, and goals. Subcommittees formed to develop the concepts and priorities for this planning document. These groups met to identify the key issues and concerns for the Division as it continues to shape the organizational change and framework needed to be relevant to the university and its external constituencies. The following subcommittees made significant contributions to this strategic plan:

Access and Customer Service: Gary Bernhard, Lucinda Butler, Madeline Cantwell, and Bob Schrader

Benchmarking: Kathleen Chatwood, Richard Malawista, Chris Marcoullier, Heather Miller, and Va Shon Wallace-Hiltpold

Development: Elaine Anderson, Gary Bernhard, Maren Brown, Ira Bryck, Lucinda Butler, and Jera Jamison

Financial Models: Gary Bernhard, Fran Goodwin, Melody Huckins, Martin Miller, and Bob Schrader

Goals: Maren Brown, Fran Goodwin, Joe Shoenfeld, Cynthia Suopis, Va Shon Wallace-Hiltpold, and Peg Wherry

Information Technology Overview: Thomas Bunnell, Victoria Dowling, Bart Feller, Richard Malawista, Joe Shoenfeld, and Peg Wherry

Inter-unit Cooperation and Collaboration: Elaine Anderson, Wes Blixt, Martin Miller, Michael Rathke, Va Shon Wallace-Hiltpold, and Peg Wherry

Marketing and Communications: Wes Blixt, Maren Brown, Jack Cavacco, Jera Jamison, Heather Miller, Michael Rathke, John Reiff, and Joe Shoenfeld

Mission: Gary Bernhard, Kathleen Chatwood, Jera Jamison, Martin Miller, Bob Schrader, and Peg Wherry

Program Development and Online Education: Maren Brown, Victoria Dowling, Rick Hendra, Nate Schildbach, Mort Sternheim, and Peg Wherry

After the subcommittees developed and presented their findings, a format for this planning document was developed and input assembled.

Several of these subcommittees will continue to meet to foster growth and to align that growth with the goals outlined in this strategic business plan. These subcommittees include: Access and Customer Service, Benchmarking, Information Technology Overview, as well as Program Development and Online Education.

Section 3-4: CUSTOMERS & SERVICES

Customers

University-linked customers

Academic units

- Academic leadership (Chancellor, Provost, their staff)
- University departments, schools, and colleges
 - seeking on-line delivery of courses or programs
 - seeking alternative delivery of traditional courses
 - seeking partnerships for delivery of specific services or products to mutual customers
 - seeking partnerships for applied research or teaching
 - seeking specific communications services

Non-academic administrative units

- Student Affairs vice chancellor
- University Advancement vice chancellor
- Public Affairs office

Students

- part-time students
- students seeking advancement in or completion of UMass Amherst certificate or degree programs
- students seeking advancement in or completion of degree programs at other institutions
- high school students

Professional public customers

Education sector

- K-12 math and science teachers
- individuals, corporations and foundations interested in alternative learning and adult education
- other collaborating educational institutions

Business

- workforce development
- professional development
- credit program development

Government

- local government professionals
- state and federal government agencies

Arts sector

- arts management professionals
- working artists

Agriculture sector

- agriculture industries
- trade and commodity associations
- non-profit advocacy groups
- community activism oriented groups

Family business sector

- family business owners

Food and nutrition sector

- food businesses
- institutional food service providers
- public and private social service and nutrition agencies and organizations
- K-12 educational institutions
- Municipal public health officials

Environmental sector

- forestry and natural resource management professionals
- landowners
- banks, consultants and developers in areas of conservation, planning, and land use management

Human development/human services sector

- youth organizations
- state agencies working with youth and family issues
- public and private social service agencies and organizations

General public customers

- public radio audience
- local government volunteers
- 4-H participants, parents, volunteers and supporters
- gardeners
- traditional Extension specific-interest constituencies
- landowners (those managing large holdings)
- personal enrichment seekers

Services

Formal credit education

- undergraduate and graduate-level credit courses
- part-time bachelor's and master's degree programs
- academic credit for experiential learning
- academic advising
- individualized, interdisciplinary Bachelor of Arts or Science degrees
- a Springfield-based Master of Science program in science education
- professional education for arts managers, artists and civic leaders

Formal non-credit education

- professional development courses for teachers
- career enhancing certificate and professional development programs
- personal enrichment workshops
- English as a Second Language classes
- workshops and seminars on teaching math and science
- workshops on writing world wide web pages
- pre-service and in-service teacher training
- professional education for arts managers, artists and civic leaders
- training for municipal officials

Non-formal education

- internet access for K-12 teachers and students via UMassK12
- assistance in locating consultants and workshop providers
- comprehensive learning community for family-owned businesses
- nutrition outreach to businesses involving food handling and food safety to K-6 schools, community organizations serving youth, low income and at risk audiences
- nutrition education for low-income families and individuals
- technology transfer and professional education for agricultural industries through workshops, meetings, applied research projects, web sites and publications
- in-depth local news, with national and international news programs from NPR
- locally produced classical, jazz, folk, and multicultural radio music programs
- sponsorship of cultural trips as well as numerous regional arts and music events
- sponsorship, training and support for 3000-member volunteer network leading organized youth development activities in each region of the state
- professional networking for municipal officials

Section 3-5: TRENDS

- The sustainability of community-based scholarship has become increasingly important.
- The need for greater access to higher education has increased the availability of flexible delivery methods and modes of education.
- While continuing education remains directed principally toward adult audiences, marketing directed at high school students is increasing.
- Use of new information technologies in the higher education environment continues to increase and this trend is expected to continue with such examples as online learning, free laptops, wireless classrooms, online calendars and communications, becoming commonplace.
- Current areas of growth for outreach education include health care, education, technology and business.
- Competition is becoming fiercer and faster.
- Higher education is increasingly a global business.
- Outreach is charged with being a fiscally contributing asset at more and more universities.
- The percentage of adjunct faculty used in teaching is growing nationally.
- Traditional trade- and commodity-based constituencies are giving way to more diverse and fluid constituencies, creating needs for outreach initiatives to be equally fluid, flexible, and quick to respond.
- Reduced enrollments of “traditional age” (18-22) students caused by long-term demographic shifts are expected to affect core offerings of universities.
- Advanced technological and transportation infrastructure is increasingly expanding to rural areas.
- Public higher education is becoming more business-like and entrepreneurial.
- Financial aid grants are increasingly replaced by loans.
- Academic degree requirements for education workers (early care providers, Head Start teachers, public school paraprofessionals, etc.) are becoming more common.
- Number of business organizations investing in employee lifelong learning is increasing.
- Satellite radio is significantly increasing its subscriber base.
- Consolidation of media ownership and/or control (including public radio) is increasing.
- Introduction of new delivery methods for radio broadcasting is accelerating.

Section 3-6: FINANCIAL INFORMATION

Outreach programs are supported by a variety of funding sources. These include state appropriations, federal grants, foundation grants, private donations, tuition income, contracts and user fees.

Division-wide financial oversight capacity is currently inadequate. Systems for forecasting and monitoring financial performance are needed. These systems must incorporate the specific needs of Outreach units while also establishing core parameters for benchmarking financial performance within Outreach and among peer institutions. Periodic monitoring, using a quarterly review, is essential for ensuring unit performance.

Systems and metrics to monitor Outreach goals are not currently in place. Metrics must be developed to monitor, on a quarterly basis, the financial performance of revenue-generating products in order to best serve markets and maximize revenue. These measurement tools will be used during formal quarterly scorecard reviews that have yet to be instituted.

Section 4 Conclusion

The challenge ahead of us in the coming years is significant:

- to draw academic departments, outside constituents, public policy makers and the Outreach units themselves into thinking differently about what it means for the University of Massachusetts Amherst to be an *engaged flagship university*;
- to position our resources for success, making sure that the organizational assets, processes and mechanisms are available to allow us to carry out that vision;
- to organize and lead outreach units to move forward in carrying out that vision.

We are in a strong position to undertake the challenge. We are fortunate to have university leadership that reflects a strong institutional will to proceed. We have an experienced, committed and creative staff that is eager to face the challenges ahead. Most importantly, each of our Outreach units draws on strong and unique history of engagement that will allow us to expand and extend the UMass Amherst presence.