Report of the Joint Task Force on Resource Allocation

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May 2015
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Jennifer Normanly (Department Head, Biochemistry and Molecular Biology)
MJ Peterson (Chair of the Rules Committee, Professor, Political Science)
Amilcar Shabazz (Co-Chair, JTFSO, and Faculty Advisor to the Chancellor for Diversity and Excellence, Professor, Afro-American Studies)
Timothy Sutton (Designee of the Graduate Student Senate)
Recommendations

- The campus should continue to explore and develop a more decentralized and transparent resource allocation system.

- This development would include testing of the strategic budget allocation model examined by JTFRA, and the development of a Strategic Resource Allocation Process.

- The goal would be to have a new resource allocation process designed by Spring 2016 so that a decision can be made about both a budget allocation model and process simultaneously.
Strategic Budget Allocation Model

- Investment Income
- State Appropriations
- Tuition & Fees
- Research (Direct & Indirect)
- Gifts
- Endowment Income
- Sales & Services
- Other Revenues

Chancellor’s Strategic Investment Pool

Schools & Colleges

Auxiliaries

Administrative & Support Units
(i.e., Provost’s Office, Library, Administration and Finance, Facilities, etc.)
## Strategic Budget Allocation Process

<table>
<thead>
<tr>
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<th>Current</th>
<th>Proposed</th>
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<tbody>
<tr>
<td><strong>Revenue projection</strong></td>
<td>Primarily at campus level</td>
<td>Estimation of revenues would be an ongoing process at all levels.</td>
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<tr>
<td><strong>Expenditure Management and Budget Planning</strong></td>
<td>Little planning; units manage expenditures to remain within available budgets</td>
<td>Units manage expenditures and engage in consultative budget planning on continuing basis</td>
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<tr>
<td><strong>Strategic Investment</strong></td>
<td>Highly centralized, ad hoc, and not transparent</td>
<td>Transparent process for informing and communicating decisions, and insuring they align with campus priorities</td>
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JTFRA Schedule:

JTFRA’s charge lasts for one more year: see through the testing of the model and development of the process and system.

Consideration of both and decision about status of test and next steps by May 2016.

http://www.umass.edu/chancellor/strategic-planning/joint-taskforce-resource-allocation