Background: Phase I Planning

The Phase I planning document notes that, "As a Land Grant institution we have a 150-year history of integrating the application of our research and learning with the needs of state and local agencies, organizations, citizens and other community partners to create impact through engagement (p 33)." The report further notes that Effective engagement requires broad participation, articulation as an institutional priority, and appropriate leadership support. Since the dissolution of the formal University Outreach unit, the campus has pursued a decentralized model to identify, support and evaluate engagement efforts. While effective work continues in individual units, the absence of an institutional perspective complicates the task of identifying priorities, aligning those priorities with appropriate resources, and effectively tracking outreach activities. ... The next step is to develop a strategic plan for community engagement, addressing organizational structure, directions and priorities, messages, and supports and incentives. That plan should address the leadership necessary to provide coordination and support campus-wide (p. 35).

During Phase II, the Joint Task Force on Strategic Oversight (JTFSO) formed a Subcommittee on Outreach and Engagement that drew from the JTFSO membership, the Faculty Senate Outreach Council and the Provost’s Committee on Service-Learning. The subcommittee was charged with establishing next steps to identify “a vision and framework for UMass Amherst community engagement ... to foster development and interactions among the many on- and off-campus programs” highlighted in the Phase I planning document.

As a foundation for this work, the subcommittee developed a common definition for community engagement at UMass Amherst 1. The subcommittee reviewed national models of engagement scholarship and resources for planning. Subcommittee members utilized an institutional self-assessment tool (Gelman et al. 2005, www.ccph.info) to identify principal gaps between current performance and effective practices across six dimensions essential for an engaged institution of higher education: definition and vision, faculty support and involvement, student support and involvement, community support and involvement, institutional leadership and support, and community-engaged scholarship.

Through the discussion of the campus needs and gaps, it became clear to the subcommittee that the organizational status quo, or minor adjustments to the status quo, will not be adequate to realizing the goals described in the Phase I report. Outreach and engagement activities permeate the institution, and find their expression in the actions of faculty, staff and students in many different parts of the organizational structure. Having many perspectives and many players is a strength, and the organizational goal should be effective coordination and forging of synergies, not separation of engagement activities from the campus units in which they are embedded. But because outreach and engagement are “everywhere,” they run the risk of being “nowhere.” Effective advocacy and coordination require sustained, defined institutional leadership.
Recommendations

1) An effective and sustainable engagement strategy should be integrative across the university as a valued and essential component of our work, not as an "add-on" to the core activities of faculty, staff and students. It is proposed that a coordinated approach includes:

- **Connecting to curricular and co-curricular planning**, such as identifying what defines a UMass education and the Student Success initiatives. An education is incomplete if it does not involve applying ideas to addressing the challenges of the world. There are many ways to coordinate and expand the engaged learning and research opportunities in the curriculum and co-curriculum in support of the goal to become a destination of choice for our students. Examples of ideas to be considered include cultivating additional courses to build students’ capacities for community-based work, developing leadership programs for students to co-create opportunities for other students, and offering recognition, mini-grants and scholarship supports to those who conduct highly meritorious community-engaged work.

- **Connecting to planning for research engagement**, The Phase I plan highlights the importance of community-based research and engaged scholarship. As noted in the Phase I report, “Local governments, public schools, health-care and human service agencies, and other community-based organizations often have knowledge needs that university researchers could help to fill, and also have knowledge resources that could inform and guide university researchers. At the same time, federal agencies such as NSF and USDA are increasingly interested in connecting funded research to society’s needs and broader public impacts.” The subcommittee recognized the definition of engaged scholarship as described in Diamond and Adam (1993):

  - The activity requires a high level of discipline expertise.
  - The activity breaks new ground or is innovative.
  - The activity can be replicated and elaborated.
  - The work and its results can be documented.
  - The work and its results can be peer reviewed.
  - The activity has significance or impact.

Through community-engaged investigations, UMass researchers address crucial societal issues. There are many ways to expand and communicate this impact that can be considered in the engagement strategic plan. These may include mechanisms for aligning community identified needs with faculty research agendas; assisting faculty in documenting and communicating the impact of engaged research; supporting faculty, staff and students through training opportunities and fellowships; and fostering success in securing funding to sustain their scholarly work.

- **Connecting to planning to promote diversity, inclusion, and access.** The core values of our institution include engagement, diversity, equity and inclusiveness, social progress, and social justice. Engagement is central to building a community that reflects these values, both on campus and in the society we serve. The outreach and engagement strategic plan should consider identifying ways to build commitment to underserved communities with new and expanding opportunities such as the Springfield Initiative, creating successful pathways for underrepresented minorities and first-generation students to progress from pre-K through
graduate and professional schools, and expanding efforts to diversify and mentor the faculty, staff and student body to ensure that we have the “broadest possible pool of talent” to address the complex issues of society today.

2) It is not yet clear what the best permanent organizational approach and structure may be, and determining that will require broad consultation. But the subcommittee believes that the conversation calls for the following interim steps:

- **Identification of a senior leader, perhaps on the model of a Faculty Advisor to the Chancellor, to organize and lead the campus-wide development of a strategic plan for outreach and engagement.** It is recommended that this process be widely consultative, and engage students, faculty, staff, administrative leaders and off-campus constituencies.

- **Identification by each Dean of a college-level senior leader to participate in framing and guiding the campus-level planning process.** In addition, it is recommended that the other executive areas designate leadership to be involved in this process.

- **The interim organizational strategy will require some access to resources.** The Phase I document identified “faculty development programs and seed grant opportunities,” and a pool to jump-start key activities during the transition to a new budget model is needed. There are also early leadership and development opportunities (e.g., national conferences and workshops) that the campus should engage.

3) This leadership should engage the campus in the development of the Outreach and Engagement Strategic Plan called for in Phase I. The subcommittee recommends that the following key elements be included in the plan:

- **Determination of an appropriate long-term organizational structure and approach to build capacity for engagement across the institution.** The structure should enable campus and community constituencies to implement and advance community engagement priorities. It is recommended that this new structure address tracking and connecting disparate initiatives and strengthening lines of communication across the university community for great impact, intentionality, and sustainability.

- **Development of a strategy for appropriately defining and recognizing outreach and engagement in the context of tenure and promotion and other faculty personnel decisions.** While not all faculty members choose to engage in engaged teaching or research as part of their service activities, it will be useful for those who do participate to have a means by which this work can be evaluated in the context of personnel decisions. This may include convening discussions among faculty members, personnel committee members, and administrators to define the products of outstanding engaged scholarship, and sponsoring recognition awards and events.

- **Establishment of effective and sustainable means for collecting, evaluating and disseminating information on the outreach and engagement activities of faculty, students, and other members of the campus community.** A systematic and coordinated effort is needed to identify the quantity, quality, and impact of engaged teaching, learning, scholarship, and partnerships that occur. Examples include identifying and measuring learning outcomes for CESL courses, outlining mechanisms for collecting community input and impact, defining the products of engaged scholarship, and using a variety of outlets to
disseminate the results of community engagement activities, including societally relevant applications of STEM research.

• **Development of a framework for promoting and evaluating investment in high-impact outreach and engagement activities, especially in the context of a more decentralized campus budget allocation system.** This framework may include mechanisms to understand and promote outreach and engagement opportunities that may attract resources to the University, such as external grants and development; a process to establish expectations and incentives at the unit level; and ways to identify opportunities for which campus-level investment can support or leverage key activities.

• **Development of mechanisms to enhance community support for and involvement in the university’s engagement work.** A core tenet of community engagement is the “mutually beneficial exchange of knowledge and resources in a context of partnership and reciprocity.” Sustainable partnerships and reciprocity involve opportunities to create mutual understanding between university and community partners to establish sustained relationships, mutual access to community and university resources to support engaged learning and scholarship, regular opportunities to incorporate community views and leadership in mutual activities, and recognition of the benefits and incentives to promote these cooperative relationships.

As noted in the Phase I plan, “Impact exists through engagement.” By adopting these recommendations, we can “fulfill our core mission of serving the people of Massachusetts as a catalyst for positive social change, addressing significant issues in Commonwealth communities.”

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1 **Definition**

At UMass Amherst, engagement creates a mutually beneficial exchange of knowledge and resources in a context of partnership and reciprocity. Scholars and community members partner in teaching, research, creative or professional activity and service in ways that benefit academic disciplines and UMass as an institution, while at the same time addressing community-defined needs or goals.

**Community engagement at UMass Amherst:**

- **Enriches the lives of Massachusetts citizens and communities**
- **Addresses societal needs and technological challenges facing Massachusetts communities, the nation, and world**
- **Encourages entrepreneurial activity, stimulates the economy, and prepares the Massachusetts workforce**
- **Advances access to educational opportunities and life-long learning**
- **Prepares a diverse body of educated, engaged citizens**
- **Informs policies**
- **Adds value to and enhances the education and scholarly work of our faculty and students**

**Through**

- **Engaged scholarship, research and creative activity**
- **Generated and extended/applied translational knowledge**
- **Curricula emphasizing service learning and civic engagement**
- **Engaged teaching, learning and volunteerism using curricular and co-curricular activities**
- **Internationalization initiatives and study abroad programs**
• Provision of services to society
• Initiatives to increase access to innovative educational programs, research, and information
• Professional development opportunities that address changing societal and economic needs.
• Individual faculty, center, institute, and college projects and initiatives that demonstrate leadership in broader impacts on society