Joint Task Force on Strategic Oversight
Phase II Report and Planning

May 1, 2014
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Strategic Planning Process

- **Phase I: 2012-13**
  - Subcommittees contributed to draft of a document “setting an agenda” for the campus
  - Presented in May, 2013
    - Many specific recommendations
    - Some areas requiring additional discussion and planning
Strategic Planning Process

- **Phase I: 2012-13**
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Strategic Planning Process

- **Phase II: 2013-14**
  - Implementation of Phase I recommendations
    - Progress report on specific recommendations (Appendix A to Rules Committee special report).
  - Follow-on planning in four areas
    - “What defines a UMass Amherst undergraduate education?”
    - Initial identification of research foci at the intersection of campus strength and state, regional and national priorities
    - Organization and planning for outreach and community engagement
    - Exploration of alternative resource allocation model
Strategic Planning Process

- **Resource Allocation** separately considered
- “What Defines...?”
  - JTFSO subcommittee (Carol Barr, Zac Broughton, co-chairs)
- **Research Foci**
  - Research subcommittee/Research Council Strategic Planning Task Force (Mike Malone, Jim Kurose, co-chairs)
- **Outreach and Engagement**
  - JTFSO subcommittee/Faculty Senate Council on University Service, Public Service & Outreach/Provost’s Committee on Service Learning (Nancy Cohen, Dan Gerber, co-chairs)
Strategic Planning Process

- Drafts of all reports were reviewed and revised
  - Presentation to numerous faculty and student groups
  - Campus forum
  - Planning website and response blogs
- Once completed, recommendations will supplement the Phase I document
“What Defines a UMass Education?”

“A great institution has a character that helps define its community and guide its actions. Our undergraduate experience should contribute to and reflect that character. ... We can ... come together and identify the values, traditions, and aspirations that guide the expectations we set for students and ourselves. We can, and should, be more intentional in establishing campus-wide learning objectives that permeate the educational program. We can reflect and act on why choosing UMass Amherst matters.”
“What Defines a UMass Education?”

- Launched discussions among JTFSO, student leadership, Faculty Senate
- Tapped into student, alumni surveys
- Drew on earlier assessments of campus values and strengths
- Proposed four broad themes
“What Defines a UMass Education?”

- **Community.** UMass Amherst is a community of students and scholars working together to create a holistic, immersive educational experience. We draw from and support students’ diverse experiences and perspectives as an essential strength of this learning community, and challenge them to demonstrate inclusiveness and mutual respect.

- **Agency.** As a research university, UMass Amherst supports students to be curious, creative, and reflective. We challenge them to become more self-aware and further develop their initiative and resilience, and thus to be adept at discovering and integrating opportunities to create a successful path in a changing world.

- **Responsibility.** UMass Amherst embraces responsibility for the sustainability of the planet, for the progress of society, and for the development of each individual. We challenge students to act and advocate on the basis of critical analysis and reflection, to explore their capacity for leadership, and to contribute to the common good.

- **Proficiency.** UMass Amherst promotes and demonstrates the knowledge, habits of mind, and tools necessary for a rewarding, responsible and productive life. We challenge students to work together productively, to develop their cultural competence, to master the promise of technology, and to apply their ideas to the challenges of the world.
“[One] dimension of excellence in innovating for the public good is aligning our priorities with those of the society we serve. This can take many forms...[;] the point is to recognize and demonstrate our obligation to employ society’s resources with which we have been entrusted — including our time and the opportunities that provides — in ways that repay that investment. Exactly how alignment occurs and is evaluated will vary..., but as a public research university our contributions to meeting society’s needs should always be evident.
Research Foci

Institutional research strengths well-aligned with state, regional, federal priorities

Evidence of research strength:
- doctoral program review
- state, regional, federal engagement

Evidence of partner priorities?
- impactful programs
- funding
- as articulated by leaders
Research Foci

Institutional research strengths well-aligned with state, regional, federal priorities

- advanced materials and manufacturing
- applied life sciences and health
- cognitive science
- creative economy
- data science, computing & analytics, computational social science
- energy, climate science, sustainability
- equity and inclusion

Diversity, innovation & entrepreneurship, engagement
Research Foci

▪ Stimulate feedback and discussion

▪ Begin a process that will evolve over time
  - Launch broader discussion of emerging campus strengths (e.g., entrepreneurship)

▪ Inform unit planning and campus investment
Outreach & Community Engagement

“As a Land Grant institution ... We fulfill our core mission of serving the people of Massachusetts as a catalyst for positive social change, addressing significant issues in Commonwealth communities... Impact exists through engagement, an exchange of ideas and activities that produces a tangible benefit to society. ...The next step is to develop a strategic plan for community engagement, addressing organizational structure, directions and priorities, messages, and supports and incentives.”
Outreach & Community Engagement

Recommendations

• 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.
  • Connect to curricular and co-curricular planning
  • Connect to planning for research engagement
  • Connect to planning to promote diversity, inclusion, and access
Outreach & Community Engagement

Recommendations

- 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
  - Identification of college-level leadership
  - Some access to resources
Outreach & Community Engagement

Recommendations

- This leadership should engage the campus in the development of the Outreach and Engagement Strategic Plan called for in Phase I.
  
  - Appropriate long-term organizational structure
  - Defining and recognizing community engagement and outreach in personnel matters
  - Sustainable means of collecting, evaluating and disseminating information on outreach activities
  - Framework for investment in high-impact engagement activities
  - Mechanisms to enhance community support and engagement
Phase I Progress on Recommendations

**Diversity, equity and inclusion**

- Diversity Liaison Network formed; sharing models and issues
- Student Life Diversity Advisory Committee in progress
- Graduate Students of Color organized
- SODC reviewing issue of course evaluation
- JTFSO subcommittee on Diversity, Access and Inclusion formed
- CHIP program launched
- Diversity training re. faculty hires planned
Phase I Progress on Recommendations

- **Internationalization**
  - UMA team participating in ACE Internationalization Lab
    - (J Ahern, M Mangaliso, J Berger); Over 60 participants in 6 subcommittees
    - International Research and Strategic Partnerships: To foster and support targeted strategic international research collaborations
    - Community Engagement and Communication: To become a destination of first choice by achieving excellence and leadership in international engagement for global learning
    - Education Abroad: To foster a culture of internationalization for UMA students through a broad portfolio of high quality education abroad programs
    - Internationalization of Teaching and the Curriculum: To expand intercultural knowledge, competence, and global learning competencies across the curricula
    - International Faculty and Staff: To be a University respected for supporting and integrating international faculty and staff across campus academic and cultural life
    - International Students and Scholars: To become a premier university known for cultivating intercultural, global dialogue and learning

  - JTFSO discussion begun, follow-on planning in 2014-15
Phase I Progress on Recommendations

- **Other highlights of progress:**
  - Joint Task Force on Student Learning Outcomes Assessment developing model for program assessment
  - Investment, participation in Student Success Collaborative Platform
  - New Online Curriculum Management System
  - Search underway for new Associate Provost for Instructional Innovation
  - New Cluster Faculty Lines for IALS
  - Investment in STEM Diversity Institute
  - New program to prepare STEM postdocs and RAs for R&D careers
  - Expanded support by Office of Research Development, UMII, CVIP
  - New Vice Chancellor/CIO appointed; IT strategic plan underway
  - Libraries created Digital Scholarship and Consultation Services
Other highlights of progress:

- Doubled Graduate Fellowship funding
- 3 new Endowed Chair agreements
- Lead campus in UMass Center at Springfield
- State capital funding secured for MA Green High Performance Computing Center in Holyoke, deferred maintenance, Physical Sciences building
- Enabling gifts secured for Champions Center and Center for Entrepreneurship at ISOM
- New Integrative Learning Center opening September 2014
Strategic Planning Phase III

- All work to date will form the context for Phase III
  - Continued implementation
  - Additional follow-on planning
  - Unit planning

- Unit planning to launch in September
Campus and School/College Context

Ongoing process TBD in context of campus level prompts from Phases I and II and product of School/College unit planning

- Implementation of Phase I and II recommendations
- Coordinated with exploration of budget allocation model

Follow-on Planning

Issues and topics from Phases I and II requiring further elaboration

- Diversity, inclusion and access (JTFSO subcommittee)
- Enrollment planning (TBD)
- Resource allocation (JTFRA process)
- Internationalization (TBD in conjunction with ACE Internationalization Lab process)
- ...

Phase I & II Context

- Unit planning prompts
- Cross-cutting themes
- Data development/vetting

Define S/C process

- Tailored
- Synthesize departmental plans
- Engage faculty
- Budget process

Baseline Analysis

- Respond to Phase I & II
- Common metrics
- Disciplinary, accreditation perspectives

“Gap” Analysis

- Opportunities to improve
- Definable and feasible
- Collaboration opportunities

Action Plans

- 5-year context
- 1-3 year plans
- Evaluation & performance
- Resource strategies

Summer 2014

Summer 2014

Fall 2014

TBD

TBD