Good afternoon. The one thing I want to say is how delighted I am to be here and to be a part of UMass Amherst. I look forward to talking to you today about Outreach and Continuing Education and what it means for a university to be engaged with external constituencies.

In the three and a half months I have been here, I have had the opportunity to meet with people across the University system and a number of people outside of the system. The thing that I am most struck by is that this University uses outreach in a different way than other research universities do. We define outreach here a bit more narrowly than it is in the national context. In the national context, when we talk about outreach, people know that there are different components of outreach, that includes continuing education, that includes public broadcasting, and cooperative extension, and online and distance education, and different educational formats. It also includes components of workforce, economic and community partnerships in development. It also includes grant development. But here, if I say outreach, people think that I am excluding continuing education and all of those other areas. What I am hoping is that today we can begin to work with a broader definition of outreach and work in that national context, so that we are really able to expand the programming and how we look at it.

The one thing that I feel most fortunate about is about being here. I really want to thank Chancellor Lombardi and Provost Seymour for asking me to be a part of UMass. This is a very dynamic University. We have a lot that we can do together. We have a number of Outreach Unit Directors here and Outreach staff. I am really very appreciative of the opportunity to work with this fine staff. They are people who are committed to the University, they are committed to their programs, and they have begun to embrace the work that we are going to undertake together. I want to acknowledge a couple of people. We have someone new with us today. Peg Wherry, who comes to us from Kansas State and Weber State University, will be Director of Academic Programs and Instructional Design for Continuing Education. This is an extremely important position for continuing education as we undertake new program development. Peg is known across the country for her work nationally with the National Continuing Education Association. She serves on the board for the National Continuing Education Association and heads one of the commissions. So we really are very fortunate to have her joining us. Today, I also want to thank Wes Blixt of Extension Communications. He has been most helpful to me in trying to put this presentation together. When you are new, it really does take a village. It takes everybody to get you oriented.

When we look at outreach, the mission of outreach and our challenge is really to enhance and extend the University’s research, teaching, and service mission to external audiences. This takes a variety of forms, and it is really important that we match the University’s expertise and scholarship with the needs of the state and the diverse communities of learners. That is why you will find in formal outreach programs there is a variety of programs that come under that umbrella, because we use different modalities to reach different learners and different constituencies. I think the question that I have seen that is being asked the most here at UMass Amherst is what does it mean to be the land grant and flagship University for Massachusetts? What does it mean to be an engaged University? Other universities have already struggled with that, but that is a question that I see that we have to ask ourselves. The public expects public universities to be engaged with them. They want it, they expect it, and this resonates with citizens in every state. The engagement is changing now, especially for land grant universities. We have worked under our traditional definition of land grant, but our country is changing, the needs are changing, and so that engagement is changing. Other universities have really shifted from working across their states in very isolated and episodic ways, to being much more embedded in the kind of programming that they provide, the variety of programming, and the work they do in economic, workforce and community development. I see our biggest challenge as how are we going to be involved with these different constituencies? It is important for us to be strategic. We cannot do everything. Universities cannot be everything to everyone. We have to be strategic about those choices. If there is one message I would want to leave with you today, it is that the outreach mission is not ancillary to the University, it is not peripheral, and it is not a luxury. It is essential to what we do right now, and it is absolutely essential to our future.

In universities, you will find outreach initiatives that are both big “O” and little “o.” People have asked me, what does that mean? What falls under outreach, where you have a formal outreach organization that presents the external face of the University to people across the Commonwealth, nationally, and internationally, but you also have outreach initiatives across the University in every college? A formal outreach organization can really help those other outreach initiatives to shape and become embedded in the Commonwealth and nationally and internationally in ways that are extremely difficult for individual initiatives to undertake. So as we undertake developing a new outreach strategy for this University, it is important that we strategically choose how we are going to engage with external audiences and that we strategically make decisions about what we are going to do. I want to talk about that new outreach strategy that I see for this University, but I think that it is
important to look at what encompasses outreach now before I talk about what our strengths are, where our challenges are, and where our initial focus is.

As many of you know, the division encompasses five units. We have Continuing Education, with which people are very familiar and very comfortable, because we offer a range of credit and non-credit programming with which people are familiar. This Unit will serve 11,000 students this year in a variety of programs, and these formats are really changing in both traditional formats, accelerated formats, online, and in distance sites that we provide across the Commonwealth. Another program that we have is UMass Extension which will serve 60,000 people this year. That program has been changing. While it still has an agriculture mission, it is also developing more family nutrition programs, looking at natural resources, land use, food security and safety, because these are the needs of the communities that we serve here. University Without Walls has an enrollment of about 600 right now and alumni of 3,000. This is a very unique program for a flagship university. Many do not have it. It provides entrance to a university for adults that have not had the opportunity to attend before and it provides the flexibility that many adult learners really need. In addition, there is the STEM program, which provides science, technology, engineering, and mathematics programs for students and teachers. Our communities are really very concerned. You hear it on the radio all the time, and on news casts, especially in the last couple of months, about how much do our students really know in science and mathematics. This is a program to really help teachers and to help students learn and to want to learn science and mathematics and technology areas. And then the last program, which is part of the Outreach division, is WFCR public broadcasting and many of you listen to this station. It reaches 150,000 learners every week. So UMass Amherst has a number of formal outreach programs that provide strength to the University.

Some of the strengths that I have seen, in looking at this program, are that there really is a very clear institutional support and readiness for a significant Outreach Program. In my conversations with Chancellor Lombardi, Provost Seymour, and others, this University wants to have the kind of Outreach Program that other research universities have. Another strength which we have is that we already engage over 225,000 people annually. This demonstrates that there is a need for the programming that we offer, that there is a growing market, and that there is a real interest to be connected to the University. This University has had an Outreach organization since 1997. It has been a division that has been under interim leadership, different interim leadership, for that entire time. And the Units have been under interim leadership that entire time. It has not been able to form as fully as other institutions have, other flagship universities, but one of the things this institution did develop, was a Faculty Senate Outreach Council. This is significant as we go forward, so that we can be engaging people among the faculty and people across the institution to shape our new outreach directions. Those are just some of our strengths, but there are many challenges in what I have seen in my first three and a half months here. I am just going to outline some of them.

Outreach is often seen as ancillary. It is seen as a drain on the research and teaching mission of the University, instead of being seen as a source of identifying strategic partnerships, alliances and providing enhanced revenue for the University. Other universities have seen this and they have begun to be very strategic about how they move forward in developing programs with outside constituencies that this University has not and they see that the work that the faculty do in communities has an interface with faculty research. One of the questions that I see is what is the value of outreach scholarship in tenure and promotion for this University? It really is unclear. There is real question among the faculty about that. Again, other research universities, whether it is Michigan State, Illinois, Ohio State, Penn State and others, have worked to identify, have these kinds of discussions about what does this mean. They have developed criteria as faculty consider outreach scholarship in the tenure and review process. These are conversations-I am not certain where they are-in this University and how people define them. Some of the other challenges I see is that the outreach programs that we have within Outreach are not closely aligned with the academic colleges or University offices. In order for Outreach to have a significant influence in the program development that we do and working with external constituencies, we must be very closely aligned with the academic colleges and University offices. In addition, and it is not any surprise, Outreach Programs do not identify with a common outreach mission.

It is too bad that my good colleague, John Mullin, is not here, because one of the things that he has asked me repeatedly in these last three months is“what is your biggest surprise?” My biggest surprise has been that, while there is an Outreach division, it has been in concept only. It has not really been developed. It is not surprising that it has not developed, because it has been under interim leadership. There is a lot of organizational development work that we must do. Because there is not a comprehensive identification with outreach, there really are very few entry unit support and communication systems in place that other outreach organizations have. Other outreach organizations work very closely in program development, in marketing and communications. They look at student enrollment trends and registration mechanisms. They have a common IT development and maintenance system. They also work very strategically in development with alumni and donors. Those are dimensions which will all need to be developed here. In addition, because Outreach has been individual units, there really is a limited presence among external constituents, both across the state and nationally.

Many of my Outreach colleagues across the country have said“UMass Amherst used to have a national presence. Where did they go?” We should have that national presence. We have that ability and capability and, as the flagship University for Massachusetts, we need to be on the national landscape. Lastly, a challenge for us is the tuition, fee, and revenue structure at this University. To be quite honest, it is one most complicated, complex structures I have ever seen. And it is not really very
funny, even though it is funny as we work through and try to simplify it. We will try to have a good time with it. But it makes it very difficult for learners to come into the University. As we develop programs to take to non-traditional, especially adult, markets, they are going to look for ease in coming into the University. And while we may designate students as day students, as continuing education students, as University Without Walls students, they see themselves as UMass Amherst students. They want to be able to move back and forth across the curriculum with ease, and the complexity of this kind of structure does not allow that to happen very easily. These are challenges that really require a new way of thinking and a new approach and a new outreach strategy. A new outreach strategy really requires that we try to match the public needs with our institutional expertise.

Some of the questions I have been asking as I have been meeting people across the University are: how do we know to bring programs forward; how do we make those decisions? And often people say, we just know. While I think intuition is great in a lot of situations, it does not work in the outreach environment. This is called data-less decision-making. I can tell you universities do not have the kinds of resources, whether it is in money or people, to make data-less decisions about new programs to come forward. Our peer institutions are not making data-less decisions about new programs they are bringing forward. They are using market research needs assessment and marketing capabilities so that they can begin to capture those markets, because it is becoming very, very competitive. We have to be mindful of that. We are competing in a national context as we bring forward different continuing education and degree completion programs.

We also need to build relationships with external networks. I have begun to meet with people outside in the community and across the state. I have been very well received. People want to engage with this University. We have a lot of network building that we have to do. There are some networks where we have to repair relationships that we have previously had. While technology is a real part of our lives, and we use it every day, the way to build new programs, especially with external constituencies, is through relationship building. We have to have these kinds of connections. We do not do it just because it is something to do, we do it because we know one another and we cannot forget that as we move forward. It is also important that we shape new learner-focused environments. I think that this is one of the biggest challenges, especially for flagship research universities, because we are accustomed to being in an environment where there are traditional learners and they are here and they come every year. We have not had to do very much. But as universities really look to external groups as new learner environments, they have other choices. They can do it online. They can do it in an accelerated way. They can do it face to face. They can do it on the weekends. People will make it easy for them to come into their institutions. We have to be mindful of that and we really have to look at providing new learner-focused environments.

In addition, Outreach has a lot of work as we get established this year and the next couple of years. We have to demonstrate, both inside the University and outside the University, our value. People have not had that experience here. We have to build it and develop it. Lastly, we really have to demonstrate the value that external engagements has on building University research capacity, especially in applied areas. How can faculty use that in their research? I think that this is one of the biggest challenges and has been one of the reasons why Outreach has often been seen in a service way.

With that, there are a number of areas on which I have begun to focus. Whenever I come into a new organization, especially an organization that has to have self-supporting units, I look at the budget, I look at the revenue streams, I look at where there are service gaps, where there are redundancies and efficiencies, and what the staffing levels are. It is important that I spend time to assess the capabilities that we have with these various Outreach Programs. In addition to that, I have been conducting an environmental scan. I have met with every academic dean on the campus and I have begun meeting with the deans and their department heads to identify the needs and areas that we have for development. I have also met with potential students and external partners and other constituents. It is these two dimensions that really have been shaping what my initial efforts are and these next two points are a result of that. We have to build a strong leadership team. One of the areas we are focused on is recruiting a new Director of Continuing Education. That is essential for that Unit; it is the largest Unit for Outreach. It provides the most significant programs for the University. We have to have new program development and the like. So we expect to have someone on board in late spring/early summer. We will undertake a search for a Director of UMass Extension. This is an area that has been under interim leadership for many years now. In order to have permanent and stable direction, you have to have permanent leadership.

Also, I have changed a position within my office that has been vacant to be a Director of Planning and Administration to work most closely with me on the strategic development on this division. We are also developing a position for a Director of Marketing and Communications. If we are going to be able to do the kind of market research needs assessment that we need to do for the new programs that we are going to bring forward, it is essential that we have this capability. With any new organization, there really has to be cohesion, integration, and stability. Because this hasn't been well defined for this Unit, it is really important that there be a comprehensive organizational development initiative undertaken. We plan to do that early in 2005. This kind of development will really allow us to articulate an Outreach mission and to develop a shared set of core values. It will allow us to ally our programs with that mission and those values and to define and redefine an outreach strategy. It is these foundations that will allow us to realize new opportunities.
One of things that I was surprised about when I got here is that, as a flagship research University, there was not a program innovation fund. Most research universities and outreach organizations provide a centralized program innovation fund that allows new program concepts to come forward out of academic colleges and other areas that will provide start-up and seed funding for new programs to get established before they can be self-supporting. Typically, this support is provided for one to three years. If we are going to bring new programs forward, we have to have this kind of fund. Academic areas would submit grants and a group of people from across the University would evaluate these programs and we would make very strategic choices about which programs we would fund and which we would not be able to fund. In addition, we would be able to provide the kind of market research and marketing that is really needed. The individual academic colleges cannot do this. Individual programs cannot do this. Outreach typically does this for the university. It is these dimensions that will allow us to expand the credit programming and summer school offerings. That is where people across the University will first see the evidence of an expanded Outreach Program.

In addition, we need to look at how we can expand our partnerships in workforce, economic, and community development. I have been talking to colleagues across the University. Paul Kostecki, who has responsibility for workforce development, and I have been working very closely together in looking at how Outreach can enhance research capabilities of the University and to look at how we can fill gaps that exist in workforce development. Workforce development here at the University takes the research capability of the University to business and industry. It does not appear that there is a significant effort in looking at what are the training and development needs of business and industry. That is a dimension that outreach organizations typically provide for universities.

Also, we need to provide a coordinated outreach grant development process. Again, as we are looking for external monies, both at the state level and nationally, outreach organizations provide academic colleges and others grant development opportunities, so that we can move forward very, very quickly when those opportunities present themselves. Other outreach organizations work very closely with academic colleges to expand the conferencing programming and public policy fora that universities can provide. This is a significant area that this University really needs to look at. Lastly, Outreach can work very closely with Development on donor and alumni cultivation. This is an area that other outreach organizations are really very focused on because they interface so closely with many external groups.

As I have talked about the strengths, challenges, and opportunities, I really wanted to return, in closing, to Outreach as engagement with external constituencies. It really allows us to take the University’s expertise and programs and meet the real needs of people across this state, nationally, and internationally. It allows us to offer flexible and high-quality learning moments. It places UMass Amherst in communities across the Commonwealth, nationally, and internationally. At the same time, engagement has much to offer this University. It allows us to access an enhanced pool of traditional and non-traditional learners that we typically have not tried to access. It also enhances our competitive position, especially among our peer institutions. That is important as we try to secure other national funding that is available. It enhances our network of external constituents. There is not any university that can do their work by themselves; we need to have support of people across the state and nationally to do the work that we need to do. It also enhances our revenue streams. As you know, this is essential to every university and especially public universities. Public funding is diminishing and we have to look for different ways to bring new funding into universities and Outreach organizations work very consciously on how to bring new funding to universities. Lastly, it really does elevate our public profile and our stature across the Commonwealth and nationally and internationally.

It is essential for UMass Amherst to be engaged with communities. We must be engaged. It is essential to our future. I am really pleased to have the opportunity to work with all of my new colleagues to shape the kind of Outreach organization that this University deserves and should have, just as other flagship universities already have. So I want to thank you for asking me to be here with you today and I look forward to our work together. Thank you very much.