



# **Trustee Priorities for The University**

**- Progress Against the Priorities -**

**Jack M. Wilson, President  
University of Massachusetts**

**August 24, 2005**



**Mission:** The University's mission is to provide an affordable and accessible education of high quality and to conduct programs of research and public service that advance knowledge and improve the lives of the people of the Commonwealth, the nation, and the world.

**Positioning:** The path to the social and economic development of Massachusetts and its diverse regions goes through the University of Massachusetts.



## Enhance Student Learning Experience

- **Hired new Senior Vice President of Academic and Student Affairs and International Relations.**
- **Continued to build UMassOnline to serve growing number of students, on and off-campus – with enrollment over the past year rising from 14,787 to 17,554 and revenue increasing from \$12.7 million to \$16.5 million.**
- **Began development with new VP of special initiatives on international education**
- **Signed exchange and cooperation agreements with the German States of Hessen and Baden-Württemberg as well as with several Chinese universities. Hosted visitors from these and other countries.**
- **Launched new review of student retention and graduation rates.**
- **Used the UMassOnline technology platform to provide online experiences for campus based traditional students. Hundreds of courses now use these capabilities.**
- **Provide high quality university education through new modes of teaching and learning that effectively engage students.**
- **Led vigorous albeit unsuccessful effort to establish law school at The University of Massachusetts**
- **We have seen a 12% increase in applications for the University of Massachusetts during the most recent cycle.**
- **Freshmen enrollment at Amherst, Boston, Dartmouth and Lowell will rise by approximately 6%.**



## Maintain Affordability and Access

- **Advocated for and accomplished a significant increase in the state operations budget from \$327 million in FY04 to \$392 million in FY05 and now \$408 million in FY06.**
- **Advocated for a significant increase in capital allocations from the Commonwealth. The Senate Task Force has called for \$1.7 billion in spending for the University over the next five years.**
- **Obtained commitment from the Governor to request \$200 million in new capital for the University from FY05 budget surplus funds.**
- **Kept increase in student charges below CPI in academic years 2004-2005 and 2005-2006.**
- **Continued to meet the financial need of over 90 % of University of Massachusetts students**
- **Co-chaired the Massachusetts Great Schools Campaign with Blenda Wilson of Nellie Mae. The Governor, Speaker, and Senate President all took part in the launch of the effort.**
- **Significantly enhanced external revenues to the University from non-state sources such as fund raising, Commercialization of Intellectual Property, and UMassOnline.**



## Continue a Focus on Diversity and Positive Climate

- **Significantly increased gender and racial diversity of senior staff. In 2004 there were no women or minorities on the Senior Staff. Today there are two minorities and one woman.**
- **Completed report of the task force on diversity issues at UMass Boston, Chaired by Trustee Karl White.**
- **External review of diversity issues at UMass Amherst, response developed by Chancellor Lombardi, and implementation in progress.**
- **Working with campus Provosts and enrollment staff, revised the University's recruiting and enrollment practices to allow us to pursue diversity goals while remaining within federal guidelines evolving from recent court decisions.**
- **Launched a \$12.5 million partnership with the Boston Public Schools, funded by the National Science Foundation, to create new opportunities for students in the minority majority Boston Schools.**



## Strengthen Research Enterprise

- Research funding reaches record level, \$350 M, 2004-2005.
- NSF awards Amherst a \$40 million Engineering Research Center on Collaborative Adaptive Sensing of the Atmosphere (CASA) in partnership with Raytheon, IBM, MA/COM, the Weather Channel, and other universities.
- NSF awards Lowell a \$12 million Engineering Research Center in nano-technology in partnership with Northeastern and the University of New Hampshire.
- NSF awards Boston a \$12.5 million Center for Math Science partnerships in conjunction with the Boston Public Schools.
- Dartmouth is awarded a \$6 million grant for marine and textile research.
- UMass Amherst reaches the finals in the competition for an \$20-40 million Engineering Research Center on nano-technology manufacturing. We expect a (positive) announcement in September.
- Established \$600 M annual goal to be reached over a five year period, as suggested by the Battelle Report prepared for the state and MassInsight. The exact timing to be established by a process in the coming year.
- Advocated for S&T Oriented Economic Stimulus Bill (resulting in \$15 M for The University of Massachusetts).



## Strengthen Research Enterprise (continued)

- **President Wilson was appointed to serve on the board of the John Adams Innovation Institute charged with supporting the Commonwealth's strategy for research and economic development.**
- **Established \$1 M President's S&T Initiatives Fund to provide seed funding to pursue new R&D (This investment has yielded \$30 M return on investment to date). Now in a second round of funding with an additional \$1 million.**
- **Moved tech transfer to #14 among US universities (\$28.7 M in FY 2005, fueled by UMMS successes).**
- **Launched Mass Tech Transfer Center, led by nationally-recognized tech transfer expert from UC San Diego.**
- **Established \$100 K CVIP Development Fund to support commercialization of faculty research.**
- **Grew R&D from about \$325 K to over \$350 K in 2005.**
- **Worked with Trustees to create new Trustee Task Force on S&T.**



## Increase Endowment

- For the first time in the University's history the Endowment has topped \$200 million.
- Established \$500 M endowment goal to be reached over a period of years, timing to be informed by development feasibility studies now in progress. UMass Amherst has completed the feasibility study for their campaign and established a \$350 million goal.
- Secured \$9 M endowment matching fund from the State
- Negotiated \$20 M partnership with the Nantucket Conservation Foundation that is the single largest infusion of cash in the history of the Foundation.
- UMass Amherst based Rudd Chair created by donation from Andrew and Virginia Rudd of \$2.5 million. This was matched by \$2.5 million from the Nantucket Foundation Partnership and by an additional \$1.5 million from the endowment matching fund.
- New Isenberg chair at UMass Amherst.
- UMass Lowell based, but system-wide focused, Roy Zuckerberg Chair. First award of this chair to be approved at this meeting.
- Launched re-structuring of University of Massachusetts Foundation with help of expert consultant.
- Recruitment of new Foundation leadership is now in progress.



## Develop First-Rate Infrastructure

- **Restructured UMBA.**
- **Secured Trustee approval of \$2.2 B capital program.**
- **Advocated for major capital infusion by state (secured Governor's commitment to \$200 M; Senate Higher Education Task Force recommendation).**
- **Completed five-year \$995 M capital improvement program.**
- **Built 1200 apartment style students residences in Dartmouth with innovative design-build process in 12 months.**
- **Completed the new Charlton School of Business building in Dartmouth.**
- **In process of major construction program at Amherst, including central heating plant, new apartment-style dormitories, integrated science building, renovated nursing school, and new art building.**
- **UMassOnline has deployed a new online learning platform in partnership with WebCT that is also available to faculty and staff for on campus use in traditional courses.**



## Improve Delivery of Administrative and IT Services

- Established central services facility in Shrewsbury.
- Successfully launched a variety of new system-wide IT initiatives.
- Conducted a cross campus study leading to a Strategic Plan for academic technology.
- Successful “go-live” on the Integrated Student Information System (ISIS) at UMass Lowell in the spring of 2005.
- Successful “go-live” on ISIS at UMass Dartmouth in Summer 2005.
- UMass Boston ISIS system will “go-live” in Fall 2005.



## Position University in the Higher Education Marketplace

- Launched strategic marketing initiative (with new staffing and consultant).
- Testimony to state leadership and advocacy around Senate Higher Education Task Force report.
- Speaking to business leadership groups around the state.
- Wrote, or co-wrote several newspaper op-eds, and made numerous TV and radio appearances.
- Created an unprecedented partnership with state and community colleges in support of increased funding for higher education.
- Developed cooperative effort among leading business groups (Mass Business Round Table, Mass Insight, AIM, Mass High Tech Council, Mass Taxpayers Foundation, Mass Software Council, Mass network Communications Council, and many others to support University of Massachusetts agenda.
- Hired new Vice President for Business and Public Affairs
- Planning and development of University of Massachusetts Club, particularly for alumni; Board of Governors co-chaired by Grace Fey, John Fish, Marian Heard, James Karam and Jack Welch. Construction underway toward an October opening.
- Award-winning TV commercials created.
- Forthcoming economic impact report.
- UMass Honors: Inaugural event with Boston Pops.



## General Management

- **Hired new UMB Chancellor.**
- **Got long delayed contracts funded.**
- **Negotiated wide range of union and labor contracts/advocating for funding.**
- **Moved President's Office to 225 Franklin Street.**
- **Instituted annual evaluation program for every Chancellor, VP and senior official in the University and re-instituted in-depth five year review of chancellor performances.**



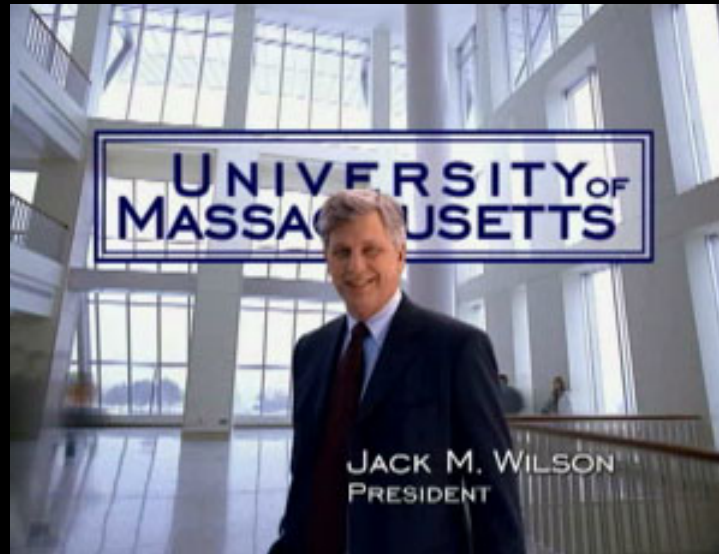
## Recognition

- **CASE award, national Silver Medal for outstanding TV commercials.**
- **MAED award as a state strategic asset for economic development.**
- **Mass Network Communications Council award for workforce development.**
- **System ranked as 45th best in the world by Times of London.**



# Jack M. Wilson, President The University of Massachusetts

**Thank You**



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