**Report of Taskforce on Centers and Institutes**

**University of Massachusetts Boston**

*(Submitted April 3, 2019)*

**Submitted to: Interim Provost Emily McDermott**

*Taskforce on Centers and Institutes*

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**Executive Summary of Findings and Recommendations**

In response to a myriad of changes at the UMass Boston including leadership changes as well as structural debt concerns and directives from the U Mass System office and the Board of Trustees, the UMass Boston administrative team began a process of reviewing all expenditures including those of the 49 centers and institutes (C&Is). Concerns about deficits among several of the institutes and centers led to a decision to implement a strict budget management plan for these C&Is (referred to as Glide Paths). This strategy reflected the intent of the administration of increasing the level of external funding for a range of C&Is.

These changes have led to concerns on the part of many including the administration, the University community and other interested groups as well as legislators regarding the process of budget reductions. In response to this the Provost launched a Taskforce on Centers and Institutes that was to gather information that would provide guidance to the Provost on strategies to support the activities of C&Is by increasing their external funding as a way of reducing current deficits.

The Taskforce consisted of 14 members, five from the C&Is, five from administration and four from faculty having experience in securing external funding. The charge to the Taskforce was to consider issues of definition for C&Is, evaluation of these entities on an annual and longer-term basis and funding options that support their activities using external sources. The taskforce, committed to a transparent process, launched a number of effort to build on what is known as effective practices for C&Is, what the concerns were in the boarder community based upon the budget decisions impacting the C&Is and finally how to engage the widest number of faculty, staff, students, members of the UMass Boston community and other interested parties from both the public and private sectors.

The taskforce after extensive data collection and analysis is putting forth the following recommendations as guidance for the Provost. These address three levels: administration, a new Council for Institutes and Centers and the C&Is themselves.

*Administration Recommendations*

* + 1. Establish Council for Institutes and Centers.
		2. Establish Central Business and Grant Services Group.
		3. Adjust revised trajectory for all C&I on glide path to 0% reduction and 3% reduction forecasts for coming year based on start of FY19 budgets.
		4. Engage University Advancement in training and fund source identification.
		5. Establish Advocacy Support in Provost Office focusing on C&I innovations.
		6. Identify within C&Is on Glide Path what activities could be supported by UMB resources including but not limited to teaching, service and administration for UMB.
		7. Develop quarterly reporting outline and variables for all C&Is.
		8. Implement new Definition of C&I recommendations.

*Council on Institutes and Centers Recommendations*

* + 1. Identify areas of shared interest across multiple C&Is as well as C&Is and faculty identifying sources of support through UA and ORSP.
		2. Launch Social Responsibility Fund for supporting range of activities in C&Is including (matching funds of grants, teaching of courses, unique recognitions [ANNAPISI], research supports, RA supports etc.) that utilizes actual and in-kind support for C&Is as seed funding to initiate fundraising challenge.
		3. Put in place evaluation system for all C&Is including annual as well as five-year reviews.
		4. Review implementation steps on a quarterly basis by Council and Provost.

*Center and Institute Recommendations*

* + 1. Establish annual strategic plan for program and funding activities as well as expansions for all C&Is.
1. Evaluate changing federal, state, and local funding opportunities and/or priorities.
2. Participate in shared services through the Central Business and Grant Services group or within the C&Is’ home college/department.
3. Establish common research themes that are more broadly marketable to foundations, grants or contracts as well as other funding sources
4. Engage and work with University Advancement to identify potential high-value prospects for C&Is.
5. Engage with and utilize ORSP’s Pivot system to identify, track and pursue grant and contract opportunities.
6. Strengthen integration and collaboration with colleges, departments, other C&Is, individual faculty researchers, or other institutions.