

# *University of Massachusetts Amherst: An Innovative Partnership*

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**I**n 2009 the University of Massachusetts Amherst (UMass Amherst), in collaboration with Hancock Shaker Village (HSV), created a new two-year master's degree in historic preservation and architectural conservation for professionals in the field. Combining university courses with training and classes on site at a national historic landmark, the program leads to a Master of Science in Design with a concentration in historic preservation and is unique in the region and the Commonwealth.

Developed by the departments of Architecture + Design and Public History and the university's Continuing & Professional Education (CPE) unit, the new program is delivered in a four-semester, alternate-weekend format that allows mid-career professionals and other working people to pursue and complete a graduate degree. It offers advanced study of traditional building materials, architecture, preservation theory and practice, archival research, and cultural resource management. Students and professionals already working in the field are able to conduct field studies side-by-side with HSV staff, UMass Amherst faculty, and visiting experts on topics such as building restoration, town planning, and historic site administration. A unique highlight is the special focus on Shaker ideals, building methods, and historic craft and trade knowledge as they apply to modern life.

The benefits of this partnership are numerous. For HSV, the program extends its mission into the world of historic preservation, allowing it to

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claim a position in training future practitioners. More pragmatically, it generates additional revenue for HSV and funds a staff position that supports the architectural conservation of the site's buildings. For UMass Amherst, the new program positions the university at the center of innovative practice for training mid-career professionals and furthers administrators' aims of engaging in community outreach and developing revenue streams beyond traditional support for academic programs. The partnering departments have the opportunity to affirm a longstanding commitment to efforts that engage historical insight toward the betterment of contemporary life and to use the funds generated to invite more practitioners to speak in courses, send more students to professional conferences, and expand opportunities beyond those funded by campus administration. For CPE, the partnership strengthens its ties with the community and the university, offer courses to nontraditional students and professionals in the historical preservation field to meet their academic and hands-on needs, and produces a new revenue stream during a period of fiscal challenges.

In all respects, the collaboration has proven successful, but as with all undertakings, it required a confluence of institutional missions and individual commitment.

## ORIGINS AND EVOLUTION

The University of Massachusetts Amherst is the flagship campus in the UMass system with approximately 18,000 traditional residential undergraduate students and 8,000 graduate students. Both the history and architecture departments have impressive records of work in communities and their faculty members have strong regional and national reputations for their research, publications, and teaching. In particular, the Public History Program, founded in 1986 and part of the first wave of formal programs in applied history, has long engaged in partnerships that serve cultural organizations and strengthens teaching, research, and training in the field. This degree program meets a variety of needs in the departments and provides excellent opportunities to advance both student aims as well as those of historic preservation professionals.

Partnering with HSV emerged naturally from longstanding practice. The original Hancock Shaker Village was founded in 1783 by a commu-

nity of Shakers who practiced a unique form of Protestantism. In 1957, after the death of Eldress Frances Hall, Shaker leadership began planning for the sale of the property, and in 1961 the site re-opened as an open-air museum. Today, HSV consists of 20 historic buildings on 750 acres in the Massachusetts Berkshires. Several years ago, the Village's administrators contemplated a partnership with Rennselaer Polytechnical Institute (RPI) to harness the work of RPI students in helping maintain these important structures. Students would learn skills such as repointing a stone foundation as they restored buildings on the museum campus. However, the partnership with RPI was abandoned when RPI's interests shifted.

HSV subsequently turned to UMass Amherst in the persons of Max Page, a nationally known professor in the Architecture + Design Program whose research focuses on historic preservation, and Marla Miller, Professor of History and Director of the Public History Program. Page and Miller had long sought partnerships that embraced the ideal of social justice and created new opportunities for their students. The proposed curriculum at HSV, which advanced the museum's commitment to the interpretation of "principled living," was especially appealing to Miller and Page for its goals and for the opportunity of giving UMass Amherst students hands-on, site-based learning at a spectacular historic site. They were especially attracted to HSV's mission statement, which asserts that HSV "is a place not only to preserve the Shakers' story but to understand they made an extraordinary choice to gather together in community in order to live a principled life and embrace certain values—equality, nonviolence, community, sustainability, responsible land stewardship, innovation, simplicity, embodiment of a spiritual ideal, and quality in work," values that "still resonate today."

In fall 2008 and spring 2009, Miller and Page began researching this proposal. After talking with colleagues and gaining the support of the upper-level university administrators, they were put in touch with CPE because the day-school departments could not support new programming and CPE had a strong record and experience in successfully developing courses and programs, especially in nontraditional contexts. Its staff is especially skilled at facilitating discussions of budget, marketing, and program planning to help assure success. During the 2011 academic year, for

instance, CPE presented 14 graduate degree programs, six undergraduate degree programs, and a total of 1,400 courses, both face-to-face and online.

Because of the initial discussions with RPI, HSV already had a proposed curriculum and adjunct instructors in place. For their part, Miller and Page felt it important that the curriculum be clearly associated with UMass Amherst, so they negotiated a three-course per semester format in which one course would meet on the UMass Amherst campus (using UMass Amherst faculty when possible), with the remaining two taking place at HSV. Preservation consultant Steve Bedford would direct the HSV / UMass Amherst initiative for HSV and draw on his contacts in the field to staff the onsite courses.

Having a proposed curriculum was only the beginning. As a degree offering from an accredited university, it was imperative that all academic requirements be fully met. Anyone associated with a university knows the long and complex process involved in curricular innovations, beginning with approvals by the appropriate faculty committees through the vote of the faculty senate. Fortunately, this program was able to launch on an accelerated timeline because a degree was already on record—the Master of Science in Design in the Department of Architecture + Design—that allowed a high degree of flexibility. Working quickly with the appropriate members of that faculty, a curriculum was finalized and resulted in the Master of Science in Design / Historic Preservation under the auspices of CPE.

Continuing & Professional Education became the institutional lead for coordination of planning, defining, and establishing the appropriate milestones. The timeline was ambitious: accept degree applications in February 2010 and start classes in September 2010. Some immediate questions essential to the program's success had to be addressed early on: Who would enroll in the program? How far would they be willing to travel to attend? What was a reasonable but appropriate cost per credit hour? What other universities offered such a program and how would the potential competition be addressed?

HSV and RPI had conducted some initial market analysis and environment scanning of similar programs at other universities. These data were re-examined, updated, and reconfirmed. It was determined that there were very few such programs at other universities and those who did would allow us to charge rates that would be competitive but high from a UMass Amherst perspective. Sue Cassidy, CPE's marketing coordinator, developed

an in-depth marketing / advertising plan that addressed target populations, provided awareness and later details, contact information, and the value / importance of such a degree.

Both HSV and UMass Amherst made crucial early investments to fund the future program before any revenues were generated. HSV funded the salary of the onsite program coordinator during the development year while the UMass Amherst graduate dean funded the work of Public History and Architecture + Design program graduate students, who provided essential support ranging from research into comparable programs to the creation of a program website. Miller and Page invested hours of administrative time and CPE designed promotional materials and located venues.

In spring 2009 the conversations turned toward practicalities such as compensation for instructors and for the HSV-based program director while addressing disparities between hopes and realities. Also addressed was the level of overhead required by UMass Amherst budgeting, which HSV projections had not anticipated. In order to make the numbers work, Miller and Page negotiated with HSV and UMass Amherst officials, adjusting HSV's expectations as needed and securing an agreement from the Dean of the College of Humanities and Fine Arts to waive the college's percentage of revenue. HSV also secured donors to fund some start-up costs at the Village for purchasing necessary equipment and upgrading instructional spaces.

Conversations continued over the summer. Dean of the Graduate School John Mullin agreed to "backstop" the program, if necessary, in its initial years. CPE agreed to continue to contribute start-up marketing costs. Drafts of memoranda of understanding (MOU) circulated by July 2009 and the final document was signed in August. The appropriate paperwork moved through the faculty senate over the course of the months that followed thanks to the support of another UMass Amherst faculty member, Steve Schreiber, as Graduate Program Director for Architecture + Design. Meanwhile, others worked to move ahead on designing a brochure and website.

It was critical to have Page and Miller as faculty champions. They accepted the responsibility to undertake the initial meetings and coordination, bring various officials on board, obtain commitments of support, explain the value and importance of the program to campus administrators, collaborate with the external partners, and generally proselytize all listeners. This level of faculty support cannot be overemphasized. Without their dedication and enthusiasm success would not have been possible.

Degree applications were accepted beginning in late spring 2010 and the first three courses were presented in the fall 2010 term, enrolling ten students in each course. The spring 2011 term brought an average of 11 students to each of three courses. The program continues to attract new degree students. All parties agree that initial success has been achieved and there is a strong base to continue and grow the program.

### LESSONS LEARNED

A project must fully involve numerous leaders. In this instance, they were the director at HSV, the graduate dean and the CPE executive director from UMass Amherst, as well as the on-the-ground leadership of professors Miller and Page at UMass Amherst and Steve Bedford at HSV. The program had internal (UMass Amherst) and external (HSV) support as well as academic and administrative champions who provided the necessary investments of time, energy, and funding.

While the participation of multiple players advantageously increases the energy and commitment present, it can complicate decision making, so it is important to clarify early on clear chains of command and sources of authority. And even with leadership in place, a well-crafted memorandum of understanding or agreement is a must. All players must be on board and in agreement. All parties have to understand and accept the language and definitions in the agreement. In this case, after the fall and spring semesters, it was realized that the terms “student,” “courses,” and “credit hours” were not understood in the same manner, causing challenges for revenue distribution.

It is inevitable that conflicts will emerge and have to be resolved; shared goals brought the partners together, but as each sought to realize those goals, competing institutional interests had to be reconciled. For instance, some aspects of the curriculum that some partners thought had been settled continued to be discussed by others. Likewise it came out that some aspects of the budget were not universally agreed upon, such as specific sums allocated to various expenses. It is essential that all partners bring to the table a deep and genuine respect for the values, needs, and constraints of the other members of collaboration. Tact, diplomacy, humility, and patience are core skills needed by anyone seeking to engage in collaboration across disciplinary or institutional divides.

The divide between the nonprofit and academic worlds made HSV staff members sometimes unprepared for the deliberative pace at which a

university often moves, and curricular matters concerning the credentialing of instructors, the awarding of credit, and the evaluation of applications revealed a gap between the requirements and priorities of the university faculty and those of the HSV staff. Likewise, the UMass Amherst community became more aware about the values of the nonprofit sector and issues concerning relations with donors, customers, and community/regional stakeholders.

In addition to cultural differences, both sides needed to understand each other's administrative systems and processes. Two different accounting systems created challenges for the respective staff members tasked with budgeting and invoicing. As a result, difficulties were experienced in completing and approving the instructors' contracts, leading to delays that caused stress and some discontentment.

In general, effective communication throughout all organizational levels is extremely important. The specific roles of each person involved in the program should be fully defined and explained to others to reduce the potential of confusion and overlap of efforts. The appropriate avenues of communications (email, phone, face-to-face) should be encouraged to minimize confusion. Although there were coordinators at each partner's site it was not always clear who was responsible for which task, occasionally resulting in duplication of effort and an absence of attention to some issues.

The final lesson learned came from students once the program launched. The courses were designed with degree seekers as the target market. Instructors quickly discovered that some either wanted to "try on" the program with one course while others wanted a particular course. And although the program was part of CPE, it evoked interest among regular MA and MS students at UMass Amherst in access to these courses within their exiting tuition structure. We have had to become flexible by welcoming all students in the hope they will apply for the matriculated status.

## CONCLUSION

In a recent statement about the partnership, Governor of Massachusetts Deval Patrick remarked:

Massachusetts' long and storied history has left us with myriad artifacts and treasures in need of preservation and restoration. Through this program, students will learn cutting-edge techniques and tools to conserve our most precious pieces of history for future generations. This is a

wonderful program on the Commonwealth's educational landscape, and it will surely continue the state's unparalleled tradition of academic excellence.

With one year behind us and a new class arriving in fall 2011, we remain excited about the actuality and potential of this exciting partnership. The Friday courses on campus have become associated with a successful lecture series open to the campus and community. During summer 2011, CPE is piloting a one-credit course on Shaker history that could determine additional student needs and opportunities. And another faculty member will present a course during the 2012 academic year on utopian societies based on the principled-living theme of HSV. It is anticipated that some courses can be converted to fully online or blended formats, which would provide more flexibility and convenience for students and faculty during the difficult New England winters that complicate travel. While it is a work in progress and we continue to create awareness of the program, we have all learned valuable and transferable lessons and are already generating ideas for new initiatives in the years to come. 🔄